



**DESIGN SPECIFICATIONS DOCUMENT**

**ENTERPRISE SCHEDULING SYSTEM (ESS)**

**SCREEN PACKAGE**



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## Design Specification Document Version Information

The first release of this design specifications document as a project deliverable is numbered 1.0.

Subsequent revisions are numbered 1.1, 1.2, 1.3, etc. Content revisions are listed below with corresponding page numbers.

<b>Version Number</b>	<b>Date</b>	<b>Content Revisions</b>	<b>Page #</b>	<b>Revised by</b>
1.0 (First Release)	April 5, 2022	Original		
1.1 (First Revision)	May 31, 2022			
1.2 (Second Revision)				

# 1. ESS Public Interface Walkthrough

## 1.1. Create Appointment – Self-scheduling

Customer completes the appropriate form in oSSNAP. The customer receives a link to ESS, and the link directs the customer to log in via Login.Gov to use ESS to self-schedule an appointment. Once the customer is logged in, ESS presents a brief description of what the customer can expect from ESS. The customer clicks “Next” to advance to the Terms of Service and Privacy Act Statement. If the customer does not want to continue, they can click “Exit” to exit ESS.

Because the user is logged in, the user’s name appears in the top banner along with a Sign Out control.

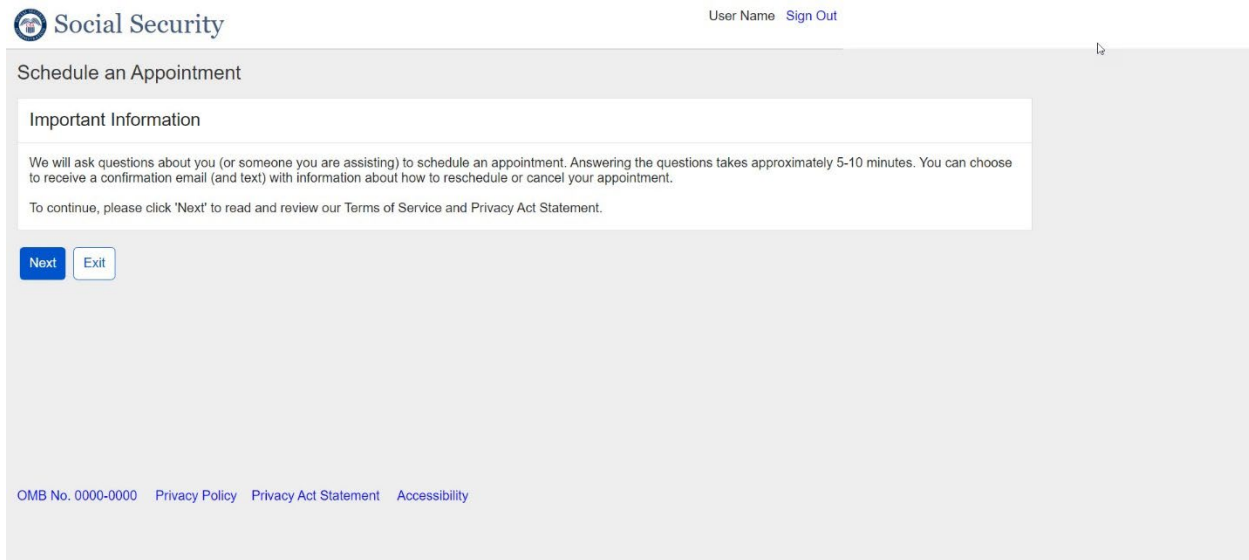
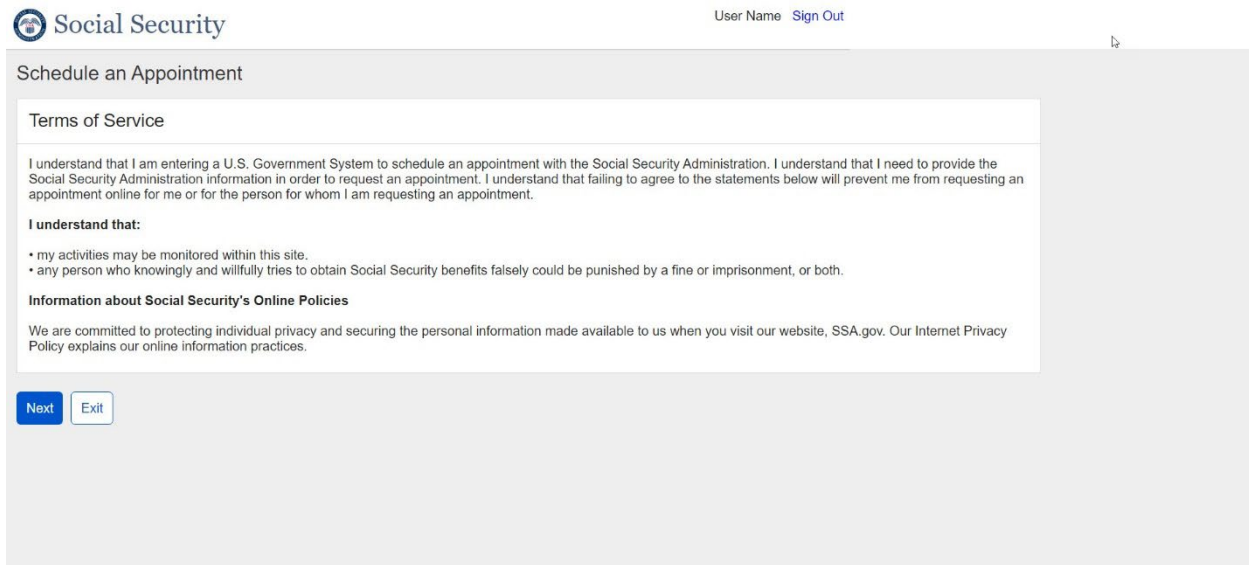


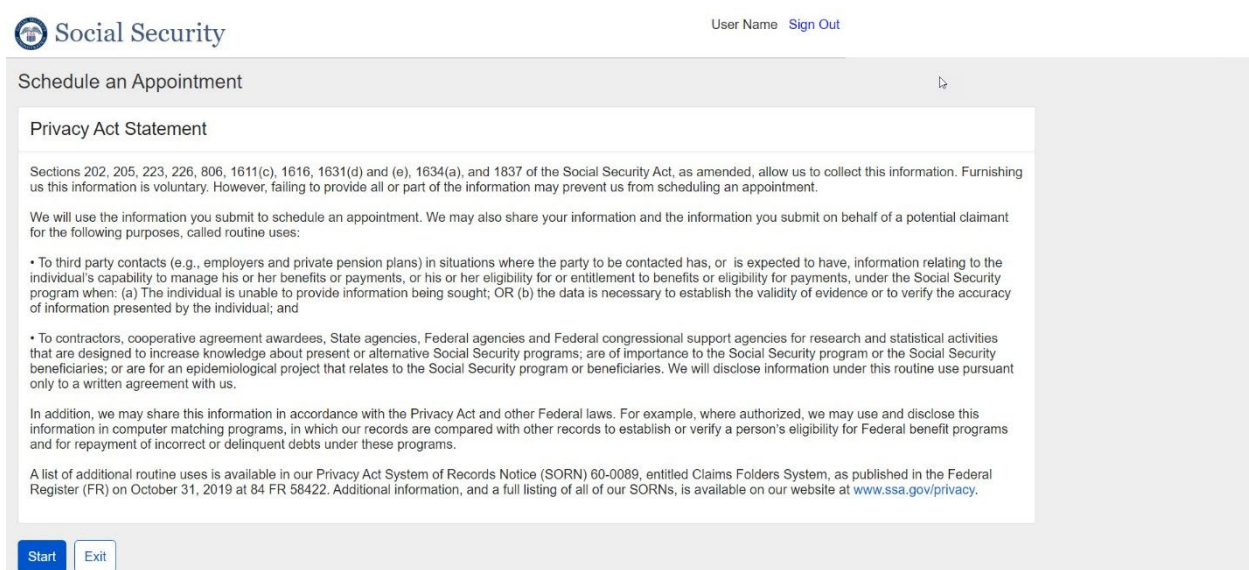
Figure 1 ESS Customer Home Page

# Design Specifications Document – ESS Screen Package



**Figure 2 ESS Customer Terms of Service**

The customer clicks “Next” to advance to the Privacy Act Statement or “Exit” if they want to exit ESS.



**Figure 3 ESS Customer Privacy Act Statement**

The customer clicks “Start” to continue.

ESS asks for the reason for the appointment that is “original or replacement social security card.”

Social Security User Name Sign Out

Schedule an Appointment

Reason for Appointment

\* Indicates required information

\* Which of these best describes the reason for your appointment?

Original Social Security Card  
I have never had a Social Security number

Replacement Social Security Card  
I need a replacement Social Security card

Next Previous

OMB No. 0000-0000 Privacy Policy Privacy Act Statement Accessibility

**Figure 4 ESS Customer Reason for Appointment**

The customer clicks “Next” to continue.

ESS asks the customer for a ZIP code, so it can find an available appointment nearby. ESS prefills the ZIP code field with the ZIP code from oSSNAP.



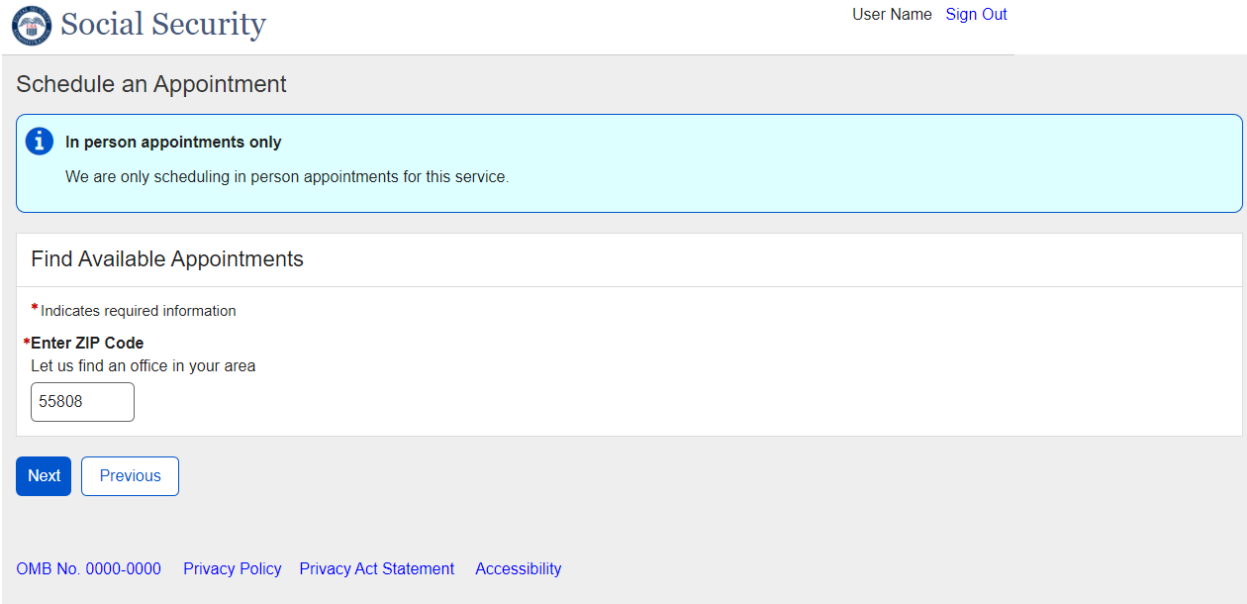


Figure 5 ESS Customer Enter ZIP Code

The customer can change the ZIP code. If the customer changes the ZIP code to one that is not initially supported by ESS, ESS displays a message:

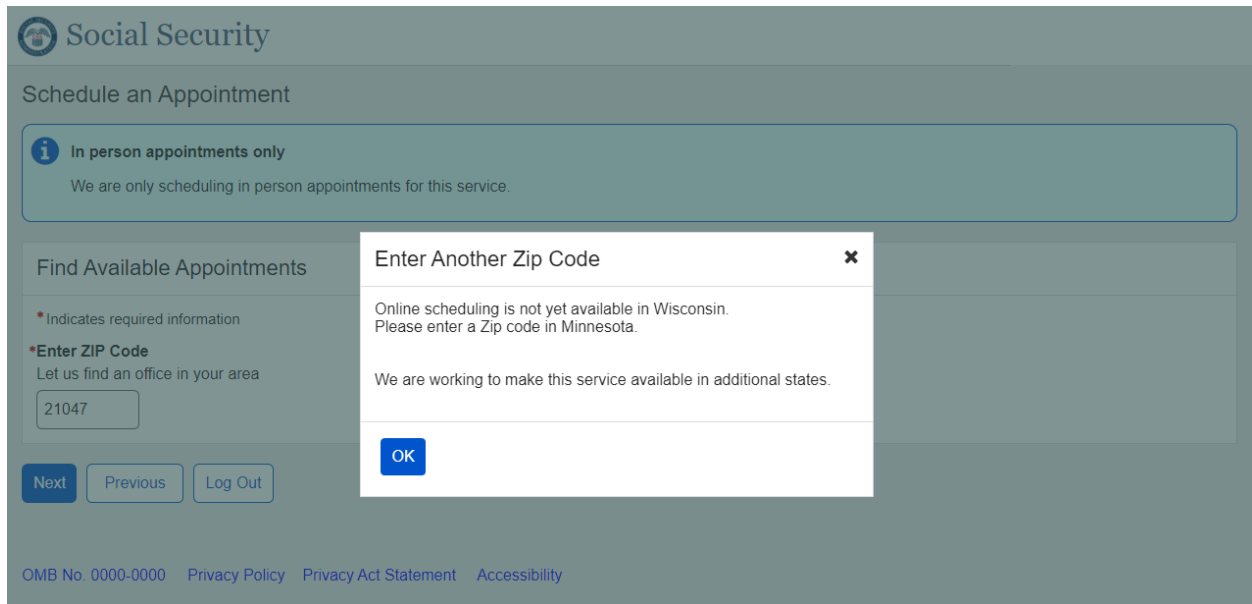


Figure 6 ESS Customer Enter Another ZIP Code

The customer clicks Next to continue.

ESS displays the first available appointment at the local servicing office associated with the ZIP code.

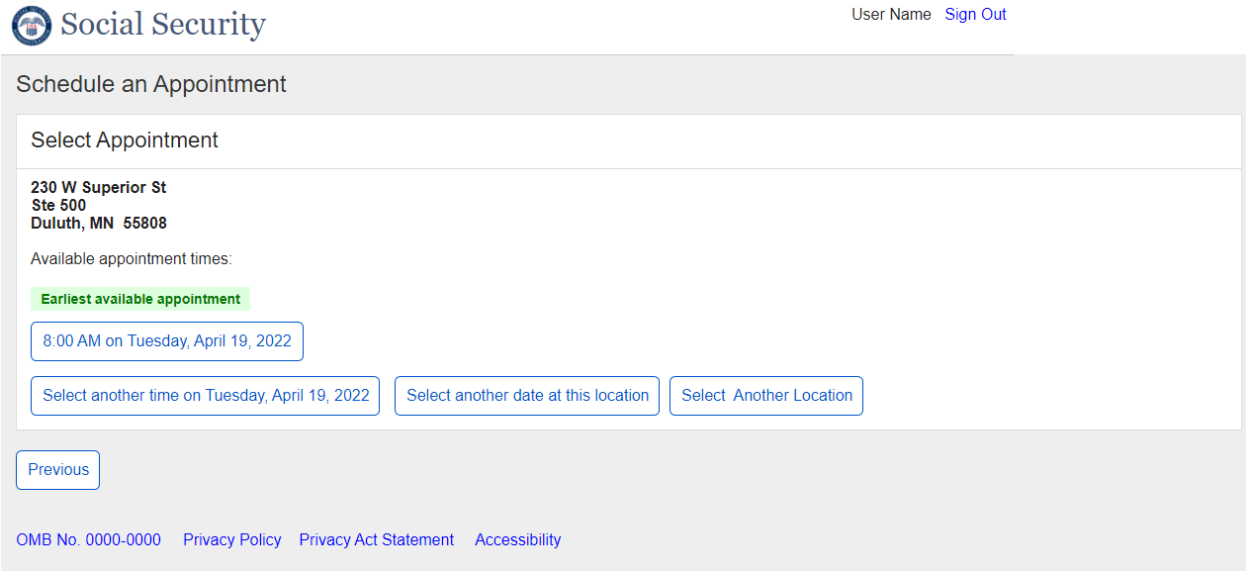


Figure 7 ESS Customer Earliest Available Appointment

If the customer finds the time and date acceptable, the customer clicks the button with the time and date on it and confirms the appointment selection.

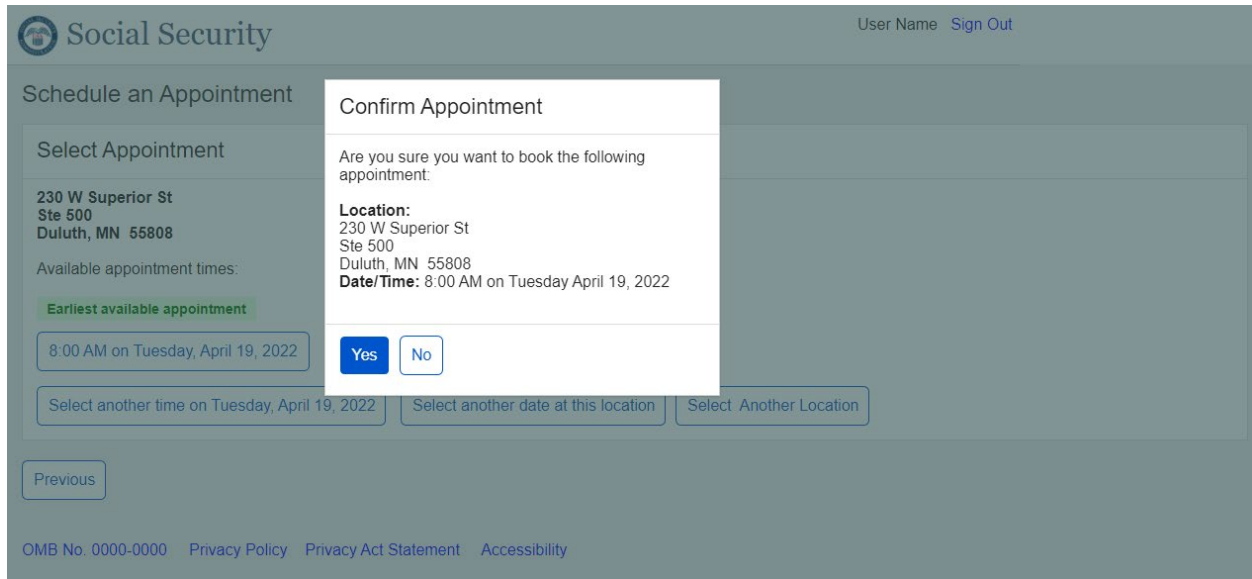


Figure 8 ESS Customer Confirm Appointment

If the customer accepts the date, but not the time, the customer can click on “Select Another Time on...”

Schedule an Appointment

Select Appointment

230 W Superior St  
Ste 500  
Duluth, MN 55808

[Select another date at this location](#)

[Select Another Location](#)

Available appointment start times for Tuesday, April 19, 2022  
Shown in Eastern DST Time zone

- |          |          |          |          |          |          |          |          |          |          |
|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 8:00 AM  | 8:15 AM  | 8:30 AM  | 8:45 AM  | 9:00 AM  | 9:15 AM  | 9:30 AM  | 9:45 AM  | 10:00 AM | 10:15 AM |
| 10:30 AM | 10:45 AM | 11:00 AM | 11:15 AM | 11:30 AM | 12:00 PM | 12:15 PM | 12:30 PM | 12:45 PM | 1:00 PM  |

[Show more times](#)

[Previous](#)

**Figure 9 ESS Customer Show Other Times on Same Date at Same Location**

Schedule an Appointment

Select Appointment

230 W Superior St  
Ste 500  
Duluth, MN 55808

[Select another date at this location](#)

[Select Another Location](#)

Available appointment start times for Tuesday, April 19, 2022  
Shown in Eastern DST Time zone

- |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <a href="#">8:00 AM</a>  | <a href="#">8:15 AM</a>  | <a href="#">8:30 AM</a>  | <a href="#">8:45 AM</a>  | <a href="#">9:00 AM</a>  | <a href="#">9:15 AM</a>  | <a href="#">9:30 AM</a>  | <a href="#">9:45 AM</a>  | <a href="#">10:00 AM</a> | <a href="#">10:15 AM</a> |
| <a href="#">10:30 AM</a> | <a href="#">10:45 AM</a> | <a href="#">11:00 AM</a> | <a href="#">11:15 AM</a> | <a href="#">11:30 AM</a> | <a href="#">12:00 PM</a> | <a href="#">12:15 PM</a> | <a href="#">12:30 PM</a> | <a href="#">12:45 PM</a> | <a href="#">1:00 PM</a>  |
| <a href="#">1:15 PM</a>  | <a href="#">1:30 PM</a>  | <a href="#">1:45 PM</a>  | <a href="#">2:00 PM</a>  | <a href="#">2:15 PM</a>  | <a href="#">2:30 PM</a>  | <a href="#">2:45 PM</a>  | <a href="#">3:00 PM</a>  | <a href="#">3:15 PM</a>  | <a href="#">3:30 PM</a>  |
| <a href="#">3:45 PM</a>  | <a href="#">4:00 PM</a>  | <a href="#">4:15 PM</a>  | <a href="#">4:30 PM</a>  |                          |                          |                          |                          |                          |                          |

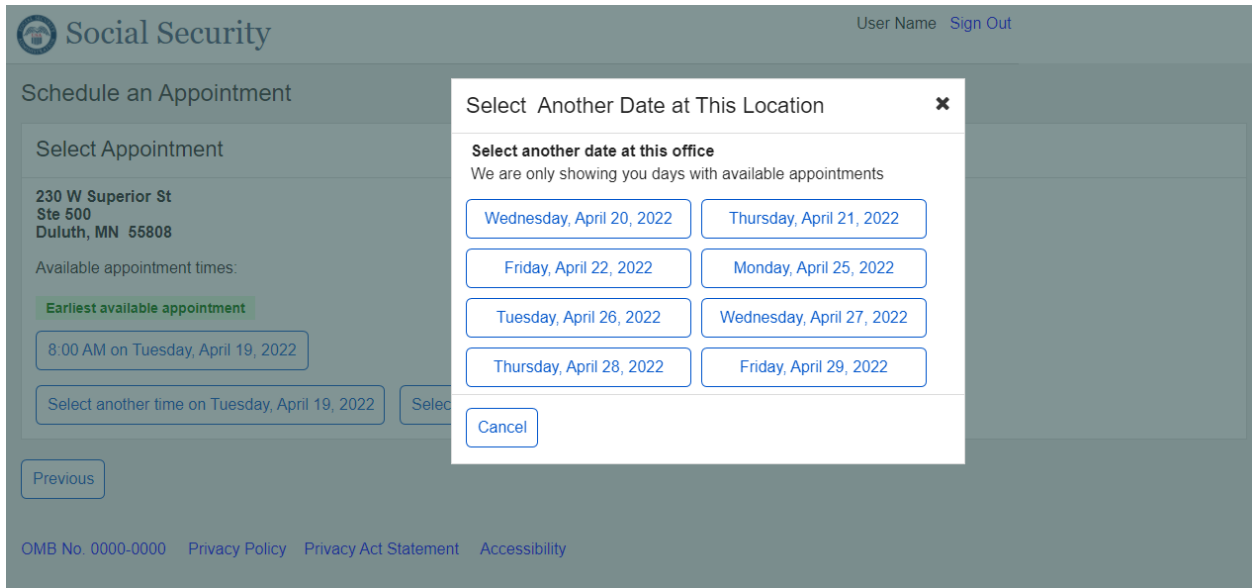
[Show less times](#)

[Previous](#)

**Figure 10 ESS Customer Show More Times**

ESS presents other available appointment times on the same date. ESS displays some of the available times. The customer can click “Show more times” to view additional start times. If the customer finds a time and date acceptable, the customer clicks the button with the time on it and confirms the appointment selection.

If the customer accepts the office location, but not the date, the customer can click Select Another Date at this Location.



**Figure 11 ESS Customer Select Another Date at This Location**

ESS presents other dates at the same office. ESS shows only those dates where the office has at least one available appointment. The customer selects the desired date by clicking the date button.

ESS presents appointment times on the selected date at the same office location.

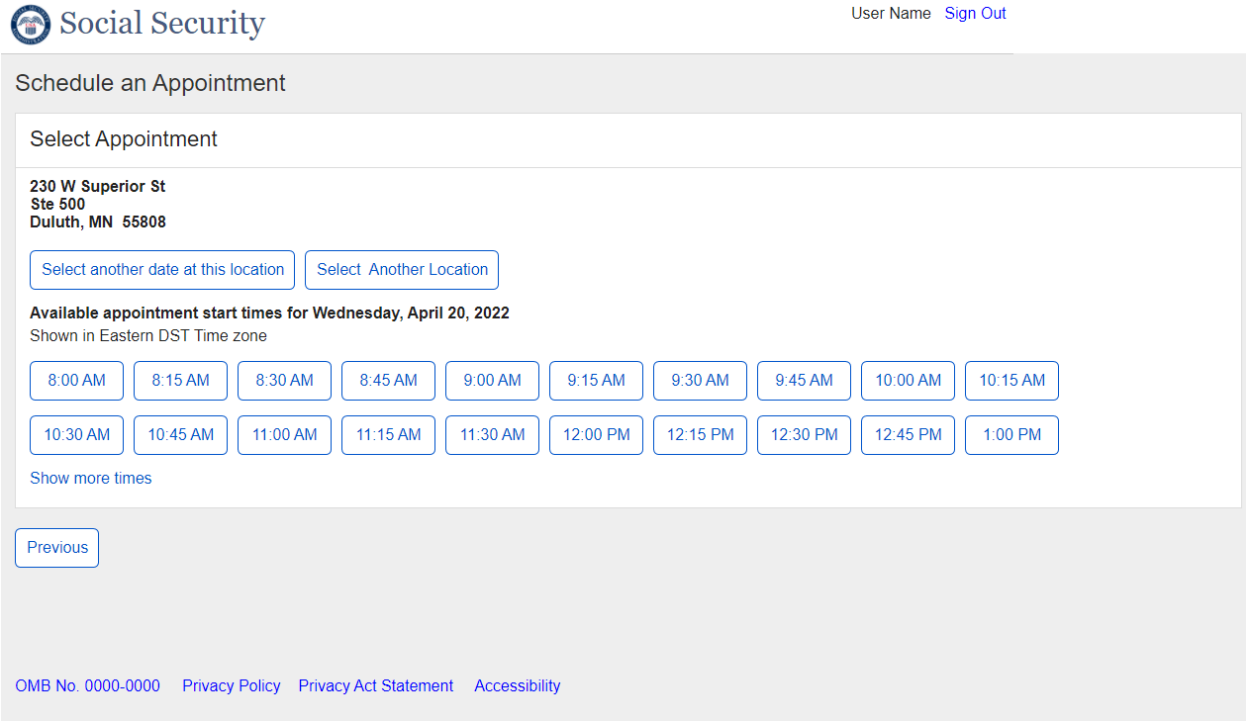


Figure 12 ESS Customer Select Appointment Time

If the customer does not accept the location, the customer can click on Select Another Location.

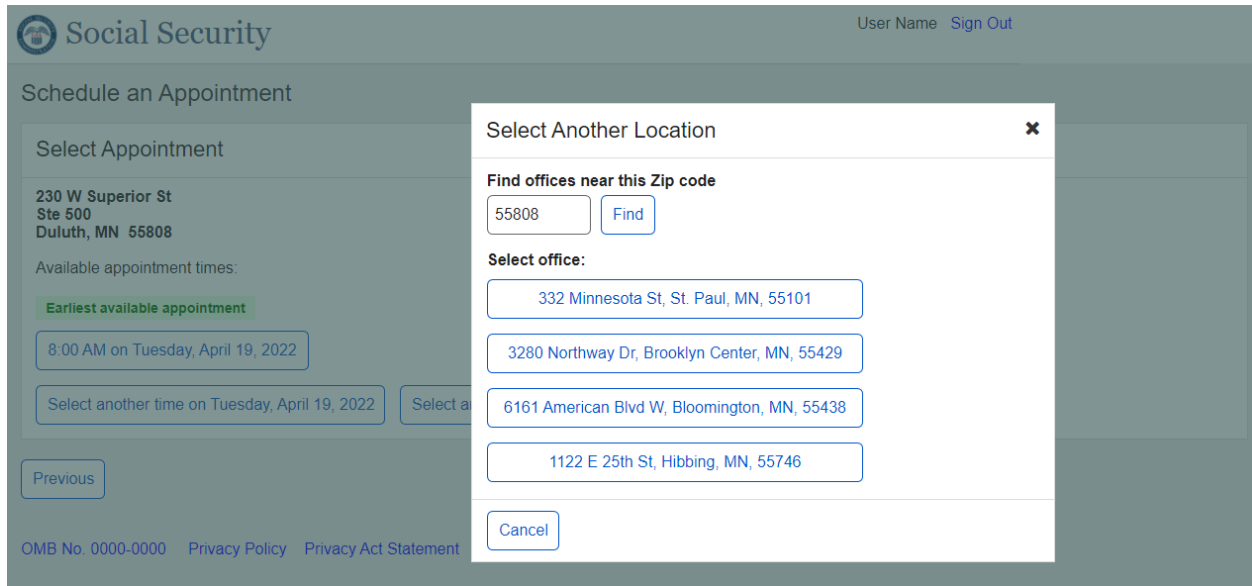
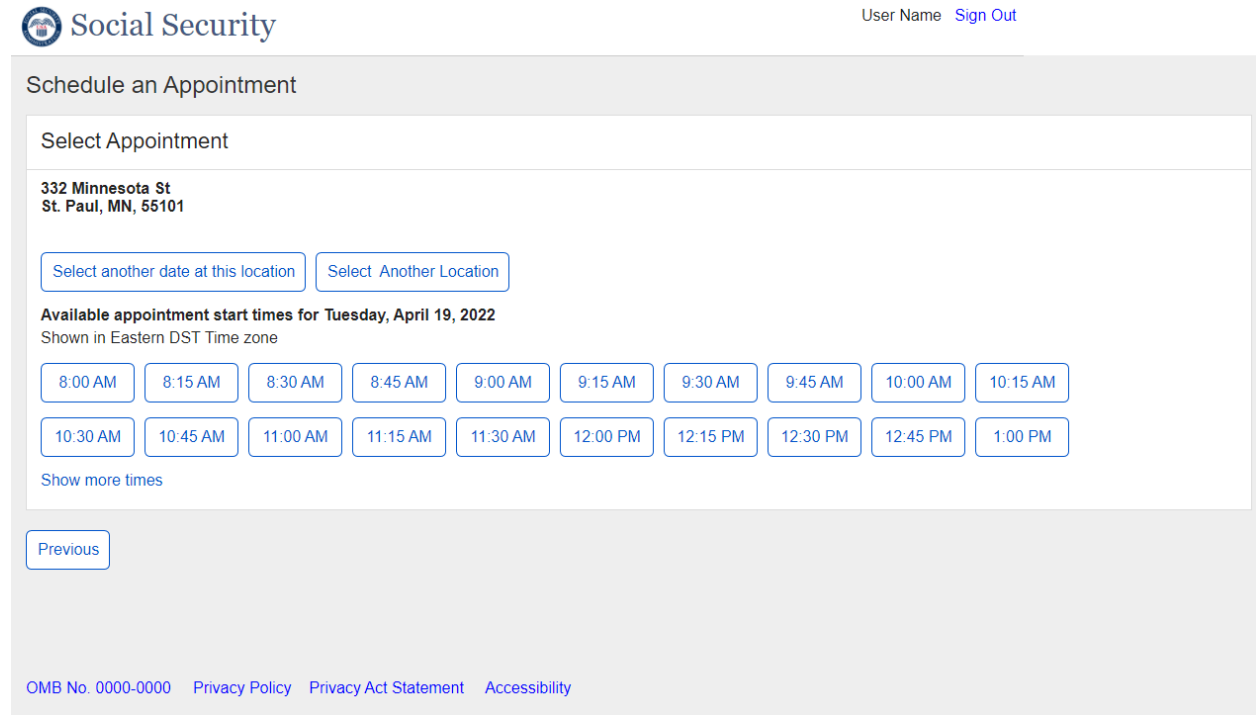


Figure 13 ESS Customer Select Another Location

ESS displays a list of other offices in the same district for the ZIP code. The customer can select one of the listed offices by clicking the button associated with it. The customer can search a

new ZIP code by entering it and clicking Find. ESS will show offices in the district for the entered ZIP code.

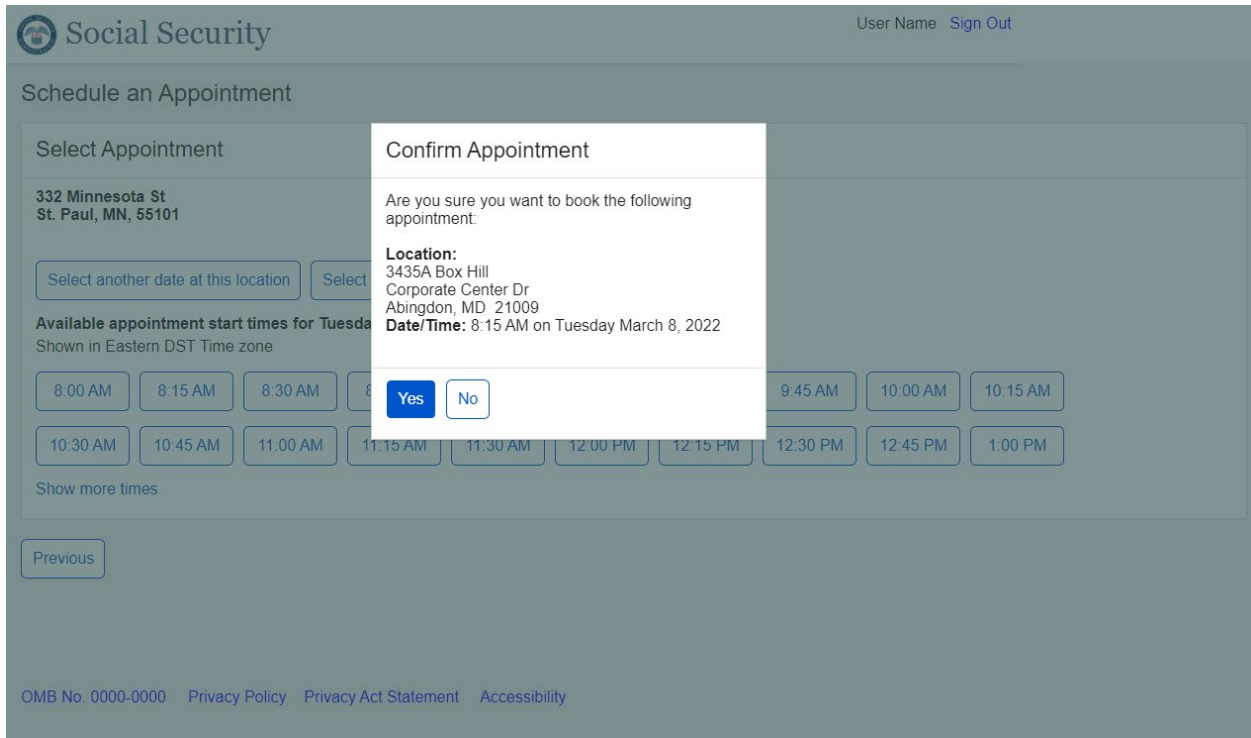
ESS presents appointment times on the selected date at the newly selected office location.



**Figure 14 ESS Customer Select Appointment Time**

When the customer finds an acceptable appointment date, time, and location, the customer clicks the button with the date and time on it. A confirmation message appears.

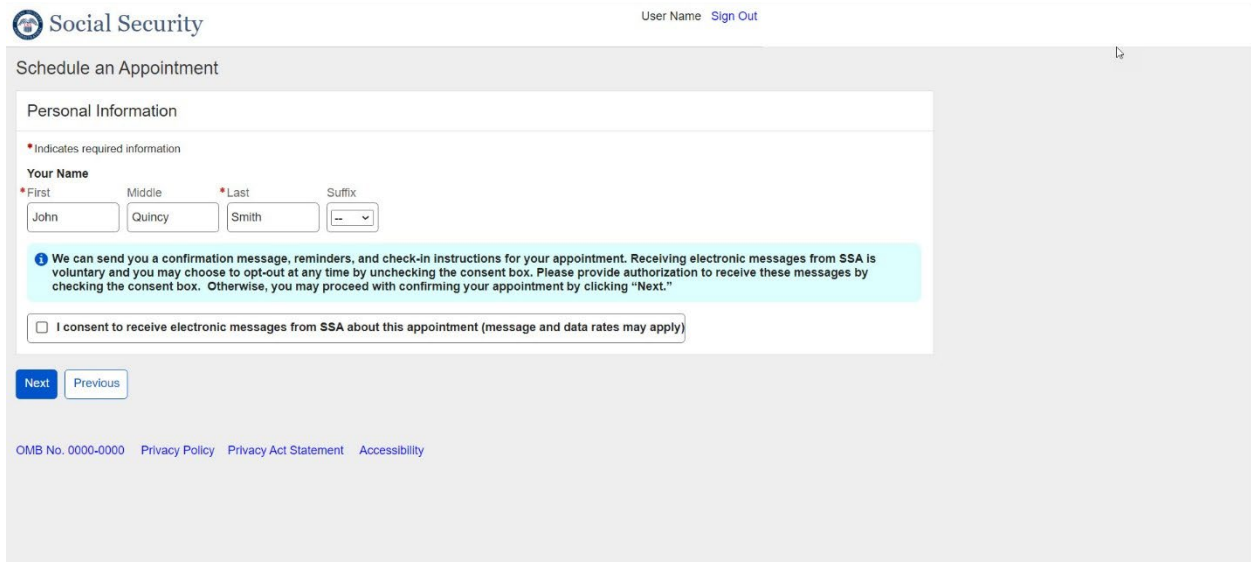
# Design Specifications Document – ESS Screen Package



**Figure 15 ESS Customer Confirm Appointment**

Customer clicks Yes to continue.

ESS asks for the customer's name and consent to messaging.

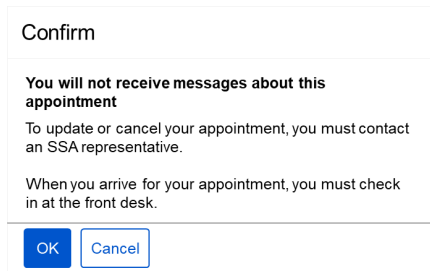


**Figure 16 ESS Customer Personal Information Before Consenting to Messaging**

Customer's first and last name are required. Middle name and suffix are optional.



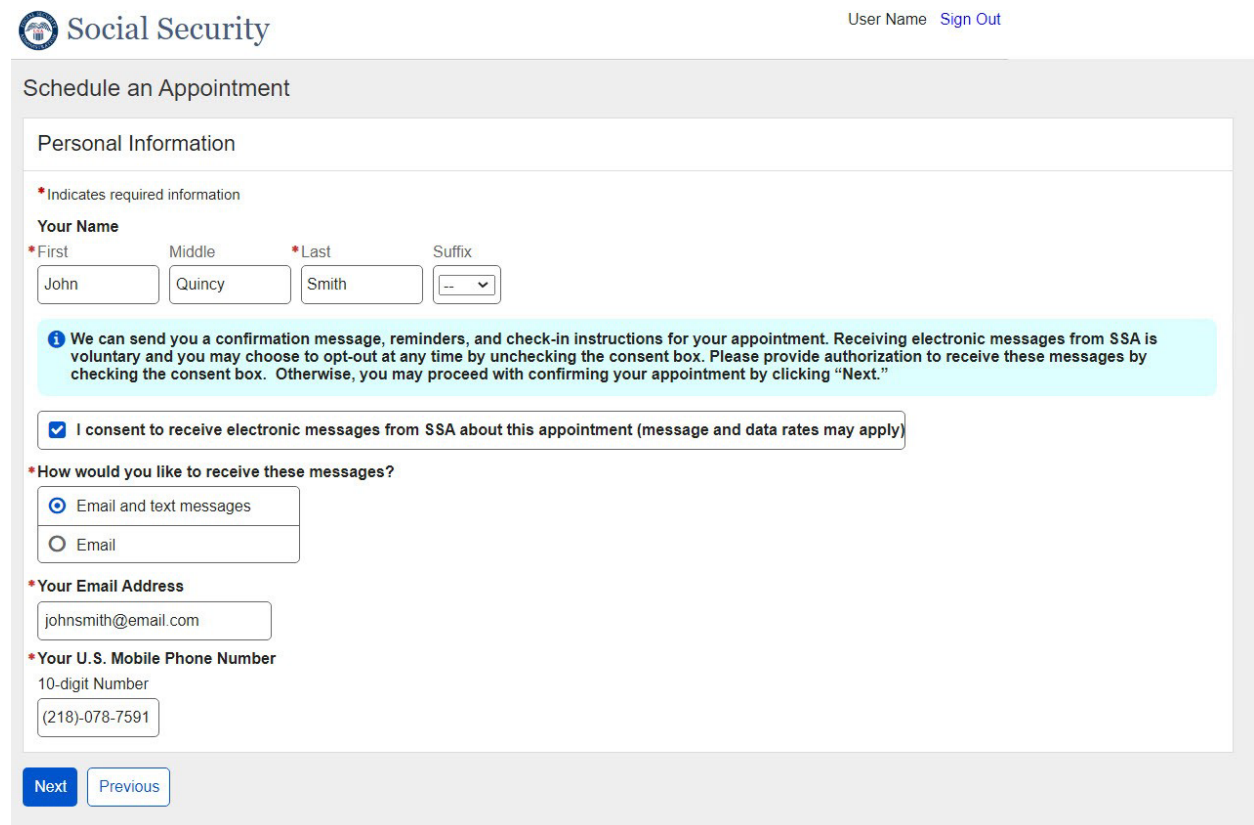
Customer can consent to receive electronic messages from SSA by clicking the check box. If customer does not check the Consent check box and clicks Next, a message appears to inform the customer that SSA will not send messages and explain what the customer must do to change, update, or cancel the appointment, and what the customer must do upon arrival at the appointment.



A dialog box titled "Confirm" with a white background and a thin border. The text inside reads: "You will not receive messages about this appointment", "To update or cancel your appointment, you must contact an SSA representative.", and "When you arrive for your appointment, you must check in at the front desk." At the bottom, there are two buttons: "OK" (blue) and "Cancel" (white with blue border).

Figure 17 ESS Customer User Does Not Consent to Messaging

When checked, ESS asks how the customer would like to receive the messages.



The screenshot shows the "Social Security" website header with the logo and "User Name Sign Out" link. Below is the "Schedule an Appointment" section. The "Personal Information" form includes fields for "Your Name" (First: John, Middle: Quincy, Last: Smith, Suffix: dropdown), a consent checkbox (checked) for receiving electronic messages, a radio button selection for "How would you like to receive these messages?" (selected: "Email and text messages", unselected: "Email"), "Your Email Address" (johnsmith@email.com), and "Your U.S. Mobile Phone Number" (10-digit Number: (218)-078-7591). At the bottom are "Next" and "Previous" buttons.

Figure 18 ESS Customer Personal Information After Consent to Messaging – Email and Text Messaging

If the customer’s oSSNAP application was completed on behalf of someone else, this page shows the Individual’s name, which cannot be edited.

Social Security johnsmith@email.com [Sign Out](#)

### Schedule an Appointment

#### Personal Information

\* Indicates required information

You are scheduling an appointment for:  
Jane Allison Smith

Your Name

<small>* First</small>	<small>Middle</small>	<small>* Last</small>	<small>Suffix</small>
<input type="text" value="John"/>	<input type="text" value="Quincy"/>	<input type="text" value="Smith"/>	<input type="text" value="--"/>

ⓘ We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by unchecking the consent box. Please provide authorization to receive these messages by checking the consent box. Otherwise, you may proceed with confirming your appointment by clicking "Next."

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply)

[Next](#) [Previous](#)

[OMB No. 0000-0000](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 19 ESS Customer Personal Information Before Consenting to Messaging – Appointment For Someone Else**

The customer must select from Email or Email and text messages.

By default, ESS selects Email and text messages. The customer’s email address and phone number are prefilled.

If the customer does not want to receive text messages, he or she must select the Email option.

Schedule an Appointment

Personal Information

\*Indicates required information

**Your Name**

\*First Middle \*Last Suffix

John Quincy Smith --

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by unchecking the consent box. Please provide authorization to receive these messages by checking the consent box. Otherwise, you may proceed with confirming your appointment by clicking "Next."

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply)

\*How would you like to receive these messages?

Email and text messages

Email

\*Your Email Address

johnsmith@email.com

[Next](#) [Previous](#)

Figure 20 ESS Customer Personal Information After Consent to Messaging – Email

Customer clicks Next to continue.

ESS asks for the customer’s language preferences.

Schedule an Appointment

Language Preference

\*Indicates required information

**i** This is the language used during your appointment with a representative  
We can arrange for an interpreter at no cost to you

\*Spoken language preference?

English

\*Written language preference?

English

[Next](#) [Previous](#)

[OMB No. 0000-0000](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

Figure 21 ESS Customer Language Preference

ESS asks for both spoken and written language preferences. Both default to English, but the customer can select another language.

Customer clicks Next to continue.

ESS presents the Review and Submit summary page.

The screenshot shows the 'Review and Submit' page for scheduling an appointment. At the top left is the Social Security logo, and at the top right are links for 'User Name' and 'Sign Out'. The main heading is 'Schedule an Appointment'. Below this is a 'Review and Submit' section with a warning: 'These are all the answers you've provided. If you need to make any changes, please select "Edit" to return to that part of the application.' The page is divided into four sections, each with an 'Edit' button:

- Schedule New Appointment**
  - Reason for Appointment**: Replacement Social Security Card
- Select Appointment**
  - Office Address: 230 W Superior St, Ste 500, Duluth, Minnesota, ZIP Code: 55808
  - Appointment date: April 19, 2022
  - Appointment time: 8:00 AM
- Personal Information**
  - Your Name: John Quincy Smith
  - Consent to receive electronic messages: Yes
  - How would you like to receive these messages: Email and text messages
  - Your Email address: johnsmith@email.com
  - Your U.S. Mobile Phone Number: (218)-078-7591
- Language Preference**
  - What language do you prefer speaking: English
  - What language do you prefer reading: English

At the bottom are 'Submit' and 'Previous' buttons. The footer contains links for OMB No. 0000-0000, Privacy Policy, Privacy Act Statement, and Accessibility.

Figure 22 ESS Customer Review and Submit


Customer reviews and can edit the information on this page.

Reason for Appointment Edit button takes the customer to the Reason for Appointment page. If the customer changes the reason, a new appointment date/time and location must be selected. The customer will traverse the pages to complete the scheduling process. ESS will 'remember' the customer's personal information and language preferences, but these can be changed, as well.

Select Appointment Edit button takes the customer to the Find Available Appointments – Enter ZIP Code page. ESS prefills the ZIP Code with the ZIP Code of the previously selected appointment location. The customer will traverse the pages to complete the scheduling process. ESS will ‘remember’ the customer’s personal information and language preferences, but these can be changed, as well.

Personal Information Edit button takes the customer to the Personal Information page. ESS does not change the appointment date/time or location. The customer continues to language preference. ESS ‘remembers’ the language preferences.

If the appointment was made on behalf of someone else, the individual’s name appears in the Personal Information section.

 Social Security User Name [Sign Out](#)

### Schedule an Appointment

**Review and Submit**  
These are all the answers you've provided. If you need to make any changes, please select "Edit" to return to that part of the application.

**Schedule New Appointment**

**Reason for Appointment** [Edit](#)

What can we help you with: **Replacement Social Security Card**

**Select Appointment** [Edit](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **April 19, 2022**  
Appointment time: **8:00 AM**

**Personal Information** [Edit](#)

Individual's Name: **Jane Allison Smith**  
Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218)-078-7591**

**Language Preference** [Edit](#)

What language do you prefer speaking: **English**  
What language do you prefer reading: **English**

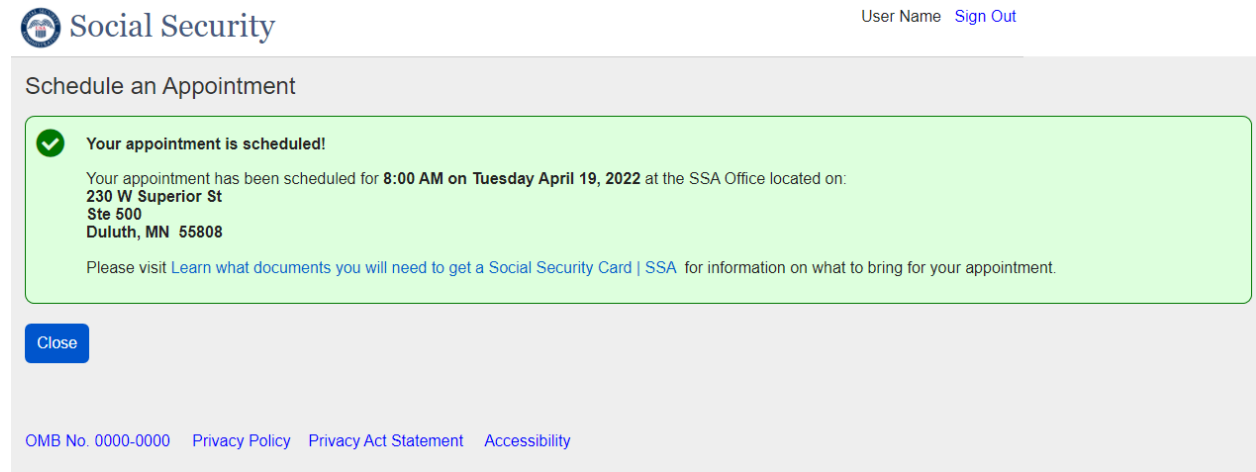
[Submit](#) [Previous](#)

OMB No. 0000-0000 [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

Figure 23 ESS Customer Review and Submit – Appointment for Someone Else

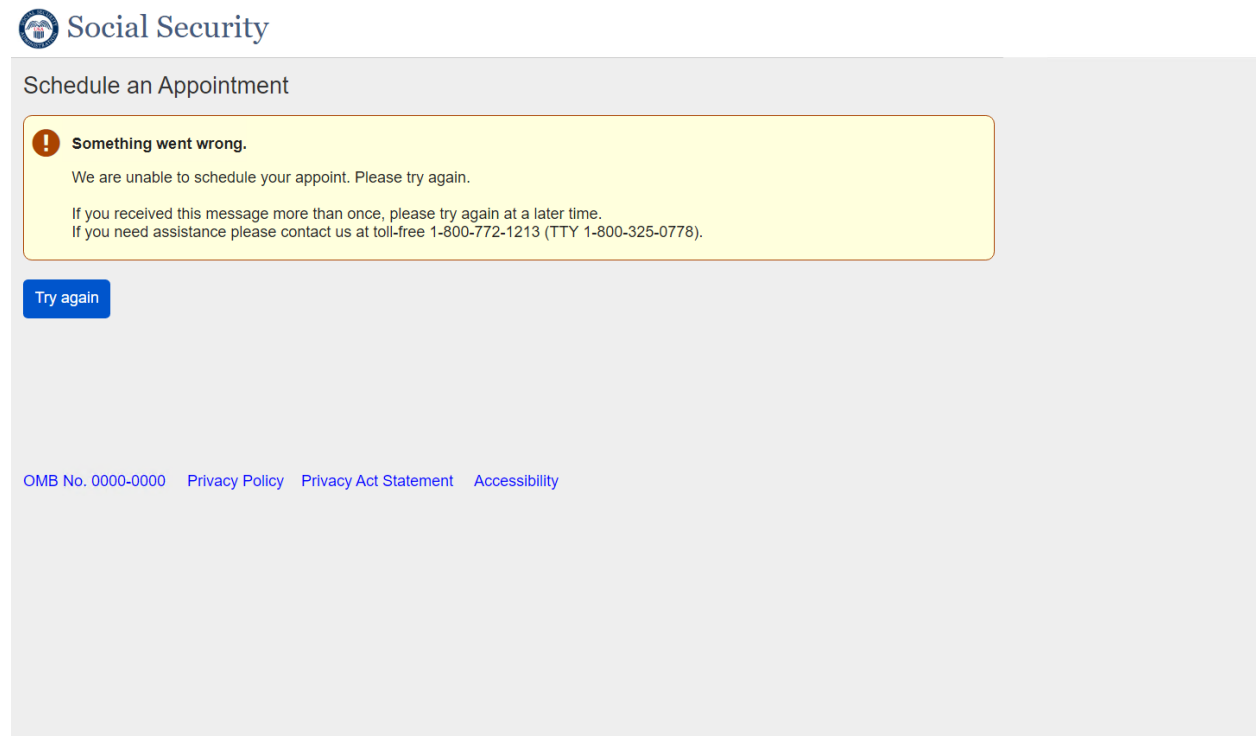
Language Preference Edit button takes the customer to the Language Preference page.

Customer clicks Submit to schedule the appointment.



**Figure 24 ESS Customer Appointment Scheduled Success**

If ESS is unable to schedule the appointment, a message appears indicating that something went wrong and asks the customer to try again. Try Again repeats the Submit action.




**Figure 25 ESS Customer Appointment Scheduled Failure**

## 1.2. Reschedule an Appointment

Customer receives an electronic message from SSA via email or via email and text, based on the customer's selection, with a link to ESS. Customer must use this link to access the appointment record to modify, reschedule, or cancel the appointment online. If the customer opted to not receive electronic messages, the customer received a pop-up message that explains that the customer must contact SSA to make changes.

If the customer schedules the appointment with a technician, the technician offers the customer a chance to create a One Time Numerical Passcode (OTP) to be able to reschedule, modify, or cancel the appointment online. The customer receives a confirmation email and/or text, and may use the link included within the message to access ESS. If the customer chooses to update the appointment using the link, the customer will first log in with existing credentials or register for a new account with Login.gov. At that point, the customer will enter the OTP to link the scheduled appointment with the customer's account.

 Social Security User Name [Sign Out](#)

### Schedule an Appointment

We could not find a scheduled appointment for you, based on your user name. If you scheduled the appointment with a Social Security representative, please enter your One Time Numerical Passcode (OTP) to get started.

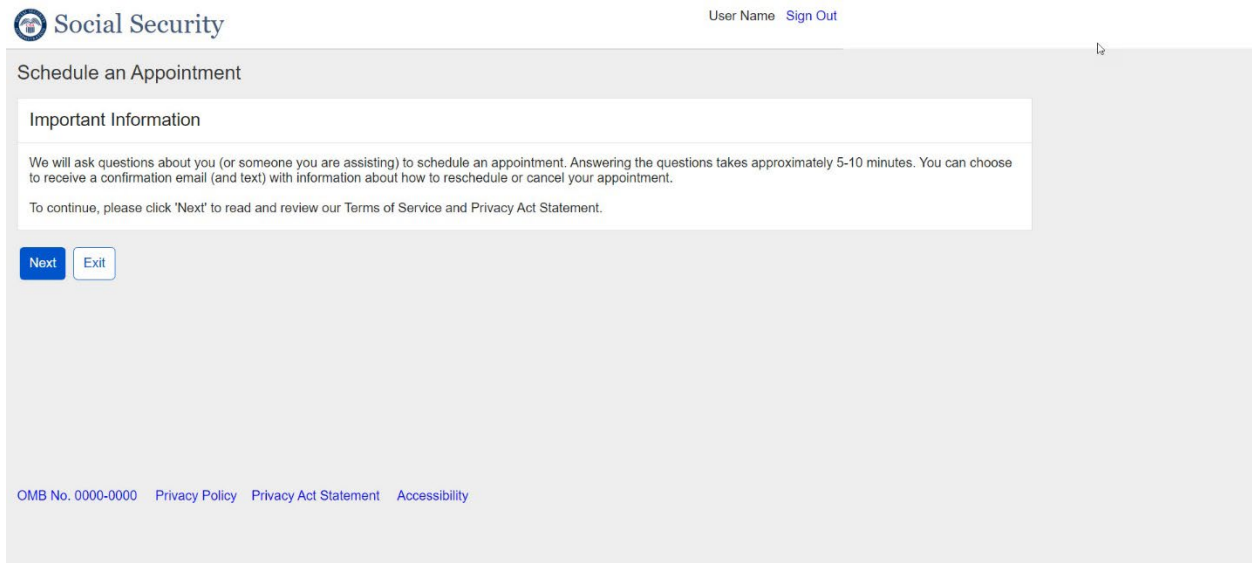
**\* Enter your One Time Numerical Passcode (OTP)**

[Continue](#) [Exit](#)

[OMB No. 0000-0000](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 26 ESS Customer Enter OTP**

Once accepted, the customer proceeds to the ESS Home Page.



**Figure 27 ESS Customer Home Page**

The customer must review the Terms of Service and the Privacy Act Statement to continue.

The customer clicks Start to begin.

ESS shows Review Your Appointment Details.



### Appointment Details

#### Review Appointment Details

The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

Reason for Appointment

What can we help you with: **Replacement Social Security Card**

Appointment Options

[Reschedule Appointment](#)

[Cancel Appointment](#)

**Office Address**

Street Address: **230 W Superior St, Ste 500**

City/Town: **Duluth**

State/Territory: **Minnesota**

ZIP Code: **55808**

Appointment date: **May 31, 2022**

Appointment time: **8:00 AM**

Personal Information

[Update](#)

Your Name: **John Quincy Smith**

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**

How would you like to receive these messages: **Email and text messages**

Your Email address: **johnsmith@email.com**

Your U.S. Mobile Phone Number: **(218) 078-7591**

Language Preference

[Update](#)

Spoken language preference: **English**

Written language preference: **English**

[Log Out](#)

**Figure 28 ESS Customer Review Appointment Details**

Type of Appointment cannot be changed without canceling and creating a new appointment.

Select Reschedule Appointment button takes the customer to the Find Available Appointments – Enter ZIP Code page. ESS prefills the ZIP Code with the ZIP Code of the current appointment location. The customer may select a new time at the same location, a new date and time at the same location, or a new location, date, and time. When the customer makes the selection by clicking on the chosen appointment start time, ESS returns to the Appointment Details and shows the updated information.

### Schedule an Appointment

**i** Your appointment was scheduled for **8:00 AM on Tuesday, May 31, 2022** at the SSA Office located at:

**230 W Superior St  
Ste 500  
Duluth, MN 55808**

#### Select Appointment

**230 W Superior St  
Ste 500  
Duluth, MN 55808**

Available appointment times:

**Earliest available appointment**

8:15 AM on Tuesday, May 31, 2022

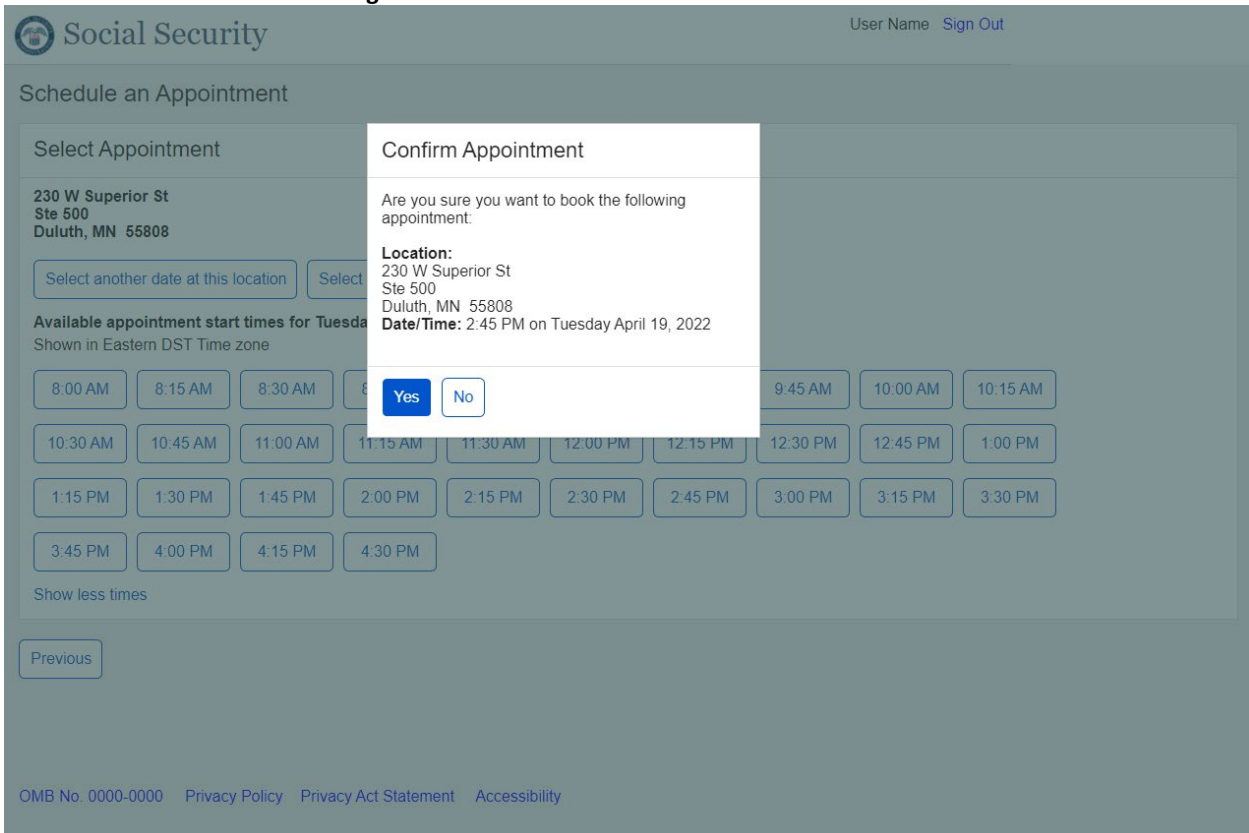
Select another time on Tuesday, May 31, 2022

Select another date at this location

Select Another Location

Previous

**Figure 29 ESS Customer Reschedule Enter ZIP Code**



**Schedule an Appointment**

**Select Appointment**

230 W Superior St  
Ste 500  
Duluth, MN 55808

Select another date at this location

**Available appointment start times for Tuesday, April 19, 2022**  
Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM
1:15 PM	1:30 PM	1:45 PM	2:00 PM	2:15 PM	2:30 PM	2:45 PM	3:00 PM	3:15 PM	3:30 PM
3:45 PM	4:00 PM	4:15 PM	4:30 PM						

Show less times

Previous

**Confirm Appointment**

Are you sure you want to book the following appointment:

**Location:**  
230 W Superior St  
Ste 500  
Duluth, MN 55808

**Date/Time:** 2:45 PM on Tuesday April 19, 2022

Yes No

OMB No. 0000-0000 [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 30 ESS Customer Confirm Appointment**

### Appointment Details

#### Review Appointment Details

The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

Reason for Appointment

What can we help you with: Replacement Social Security Card

Appointment Options

[Edit](#)

Appointment information updated. Please select "Submit" button to finalize changes.

Office Address  
Street Address: 230 W Superior St, Ste 500  
City/Town: Duluth  
State/Territory: Minnesota  
ZIP Code: 55808  
Appointment date: May 31, 2022  
Appointment time: 2:45 PM

Personal Information

[Edit](#)

Your Name: John Quincy Smith  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): Yes  
How would you like to receive these messages: Email and text messages  
Your Email address: johnsmith@email.com  
Your U.S. Mobile Phone Number: (218) 078-7591

Language Preference

[Edit](#)

Spoken language preference: English  
Written language preference: English

[Submit](#)

[Cancel](#)

**Figure 31 ESS Customer Review Existing Appointment Details Showing Updates**

Personal Information Update button takes the customer to the Personal Information page. Clicking Next returns the Customer to the Appointment Details page.

Schedule an Appointment

Personal Information

\*Indicates required information

**Your Name**

\*First Middle \*Last Suffix

John Quincy Smith ...

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by unchecking the consent box. Please provide authorization to receive these messages by checking the consent box. Otherwise, you may proceed with confirming your appointment by clicking "Next."

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply)

\*How would you like to receive these messages?

Email and text messages

Email

\*Your Email Address

johnsmith@email.com

\*Your U.S. Mobile Phone Number

10-digit Number

(218)-078-7591

[Next](#) [Previous](#)

Figure 32 ESS Customer Update Personal Information

Language Preference Update button takes the customer to the Language Preference page. Clicking Next returns the Customer to the Appointment Details page.

### Schedule an Appointment

#### Language Preference

\* Indicates required information

**i This is the language used during your appointment with a representative**  
We can arrange for an interpreter at no cost to you

\* Spoken language preference?

\* Written language preference?

[Next](#) [Previous](#)

**Figure 33 ESS Customer Update Language Preferences**

Any changes are reflected on the Review and Submit page.

### Appointment Details

#### Review Existing Appointment Details

The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

Reason for Appointment

What can we help you with: **Replacement Social Security Card**

Appointment Options

[Reschedule Appointment](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **April 19, 2022**  
Appointment time: **2:45 PM** **UPDATED**

[Update](#)

Personal Information

Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218)-078-7591**

[Update](#)

Language Preference

Spoken language preference: **English**  
Written language preference: **English**

[Submit](#)

[Cancel Appointment](#)

**Figure 34 ESS Customer Review Existing Appointment Details Showing Updates**

After making changes, customer clicks Submit to finalize the appointment.

### 1.3. Cancel an Appointment

Customer receives an electronic message from SSA with a link to ESS. Customer must use this link to access the appointment record to modify, reschedule, or cancel the appointment online. If customer opted to not receive electronic messages, customer must contact SSA to make changes.

Customer must review the Terms of Service and Privacy Act Statement before proceeding.

ESS shows Review Your Appointment Details

**Social Security** johnsmith@email.com [Sign Out](#)

#### Appointment Details

**Review Appointment Details**  
The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

##### Appointment Details

**Reason for Appointment**

What can we help you with: **Replacement Social Security Card**

**Appointment Options** [Reschedule Appointment](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **May 31, 2022**  
Appointment time: **2:45 PM**

[Cancel Appointment](#)

**Personal Information** [Update](#)

Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218) 078-7591**

**Language Preference** [Update](#)

Spoken language preference: **English**  
Written language preference: **English**

[Log Out](#)

OMB No. 0000-0000 [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 35 ESS Customer Review Existing Appointment Details**

Customer clicks Cancel Appointment button to cancel the appointment. ESS asks for confirmation.

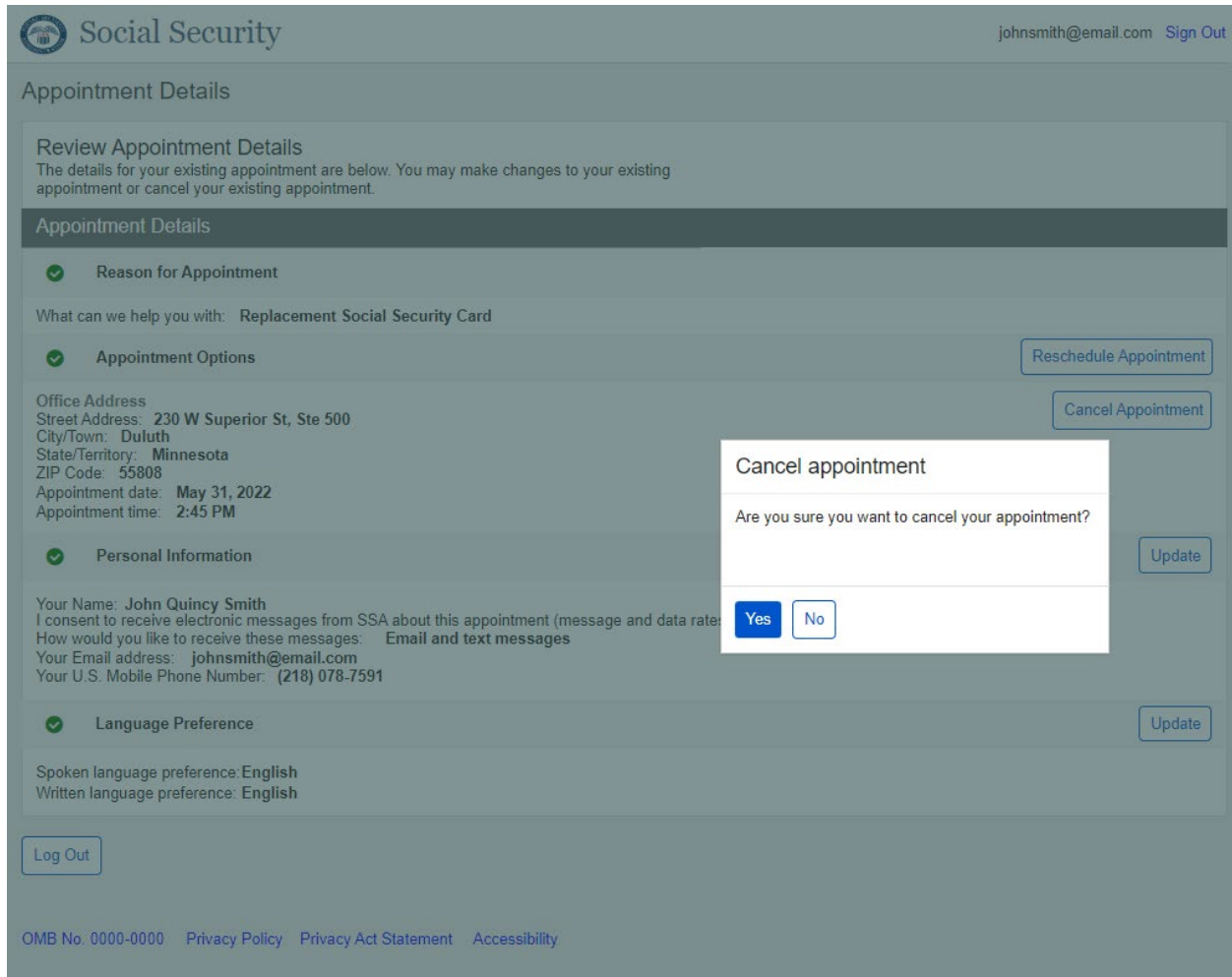


Figure 36 ESS Customer Cancel Appointment Confirmation

If Yes, ESS displays successful cancellation message.

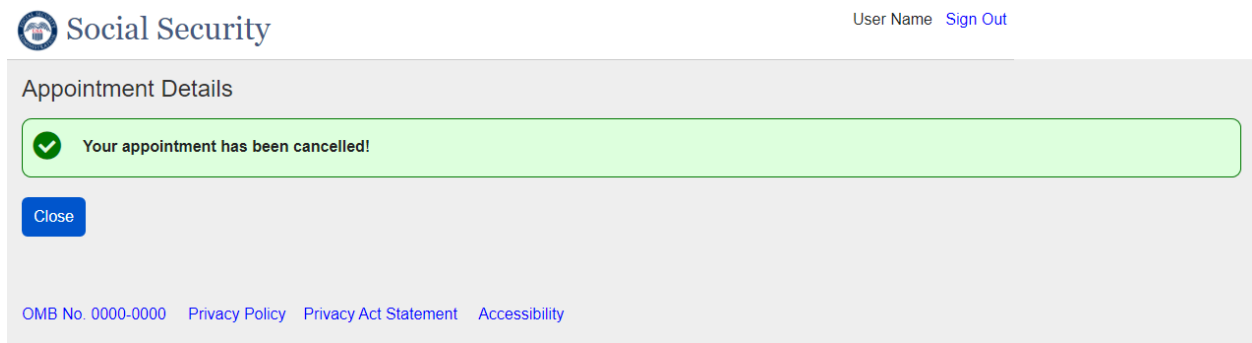


Figure 37 ESS Customer Cancel Appointment Success

If no, ESS returns the customer to Review Your Appointment Details.



## 2. ESS Technician Scheduling Interface Walkthrough

### 2.1. Schedule Appointment

The technician scheduling process begins with a phone call from a person wishing to make an appointment. The technician will verify the caller is the proper applicant from the oSSNAP application . The technician will open the Appointment function in ESS and begin to gather information from the caller.

The technician first asks for the caller’s name. First and last name are required.

The screenshot displays the 'Enterprise Scheduling Solution' interface. At the top, there is a navigation bar with 'Appointments' and 'Admin' tabs, and a user profile dropdown labeled '[User Name]'. Below this is the main heading 'Schedule an Appointment'. The form is titled 'Personal Information' and includes a legend: '\* Indicates required information'. The 'Your Name' section is described as 'This is the person requesting the appointment' and contains four input fields: 'First', 'Middle', '\* Last', and 'Suffix'. The 'Last' field is marked as required. Below the name fields is a question: '\* For whom are you scheduling this appointment?' with two radio button options: 'Self' and 'Someone Else'. At the bottom of the form are two buttons: 'Next' (highlighted in blue) and 'Previous'.

**Figure 38 ESS Technician Personal Information Startup**

The technician then asks for whom the caller is scheduling an appointment. The proper applicant can call and schedule an appointment. If the caller wants to schedule their own appointment, the technician asks for the caller’s name and DOB (SSN is an optional field). If the caller is a proper applicant for someone else and wants to schedule an appointment, the technician asks the name and DOB (SSN is an optional field) of the number holder or original number applicant as well as the caller’s name. Since the caller may be making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Personal Information

\* Indicates required information

**\* Your Name**  
This is the person requesting the appointment

\* First Middle \* Last Suffix

**\* For whom are you scheduling this appointment?**

Self

Someone Else

**Individual's Social Security Number (SSN)**

**\* Individual's Date of Birth**

Month Day Year

Figure 39 ESS Technician Personal Information for Self

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a navigation bar with 'Appointments' and 'Admin' tabs, and a user name '[User Name]' on the right. Below the navigation bar is the title 'Schedule an Appointment'. The main content area is titled 'Personal Information' and contains the following fields:

- A note: '\*Indicates required information'
- \*Your Name**: This is the person requesting the appointment. It includes input fields for First, Middle, and Last (all marked with an asterisk), and a dropdown menu for Suffix.
- \*For whom are you scheduling this appointment?**: Radio buttons for 'Self' and 'Someone Else'. The 'Someone Else' option is selected.
- Individual's Social Security Number (SSN)**: An empty input field.
- Individual's Name**: This is the person for whom you are scheduling the appointment. It includes input fields for First, Middle, and Last (all marked with an asterisk), and a dropdown menu for Suffix.
- \*Individual's Date of Birth**: Three dropdown menus for Month, Day, and Year.

At the bottom of the form, there are two buttons: 'Next' (highlighted in blue) and 'Previous'.

**Figure 40 ESS Technician Personal Information for Someone Else**

If the caller wants to schedule an appointment for someone else, the technician asks for that individual's SSN (not required), name (first and last required), and DOB. The technician clicks Next.

ESS checks the ESS database to determine if any appointments exist for the person for whom the appointment is to be made. If ESS finds any appointments, it displays a list of the appointments. The technician can then determine if the individual already has an appointment scheduled.

## Design Specifications Document – ESS Screen Package

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a navigation bar with 'Appointments' and 'Admin' tabs, and a user profile dropdown labeled '[User Name]'. Below the navigation bar, the main heading is 'Schedule an Appointment'. Underneath, there is a 'Personal Information' section with the following details:

- Individual's Social Security Number (SSN)
- Individual's Name: John Quincy Smith
- Individual's Date of Birth: April 15, 1980

Below the personal information, there is a section titled 'Multiple Appointments for this Individual' with the instruction: 'Open an appointment record to view, update, reschedule, or cancel it.' This section contains a table with the following data:

Date/Time	Location	Reason	Scheduler	Actions
04/19/2022 8:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Replacement Social Security Card	John Quincy Smith	<a href="#">Open</a>
05/11/2022 10:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Medicare Benefits	Jane Smith	<a href="#">Open</a>

At the bottom of the form, there are two buttons: 'Create Appointment' and 'Previous'.

**Figure 41 ESS Technician Scheduled Appointments Found**

If the person for whom the appointment is to be made already has an appointment scheduled for the same reason, the technician can open the appointment to view its details and make any required changes, including rescheduling the appointment.

If no existing appointments are found, ESS displays the results page with a message indicating that no results were found.

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a navigation bar with 'Appointments' and 'Admin' tabs, and a user profile dropdown labeled '[User Name]'. Below the navigation bar, the main heading is 'Schedule an Appointment'. Underneath, there is a 'Personal Information' section with the following details:

- Individual's Social Security Number (SSN)
- Individual's Name: John Quincy Smith
- Individual's Date of Birth: April 15, 1980

Below the personal information, there is a yellow message box with an exclamation mark icon and the text: 'No appointments found for this individual.'

At the bottom of the form, there are two buttons: 'Create Appointment' and 'Previous'.

**Figure 42 ESS Technician No Scheduled Appointments Found**

Once the technician has gathered information about the person for whom the appointment is being made, the technician asks about the reason for the appointment.

**Figure 43 ESS Technician Reason for Appointment**

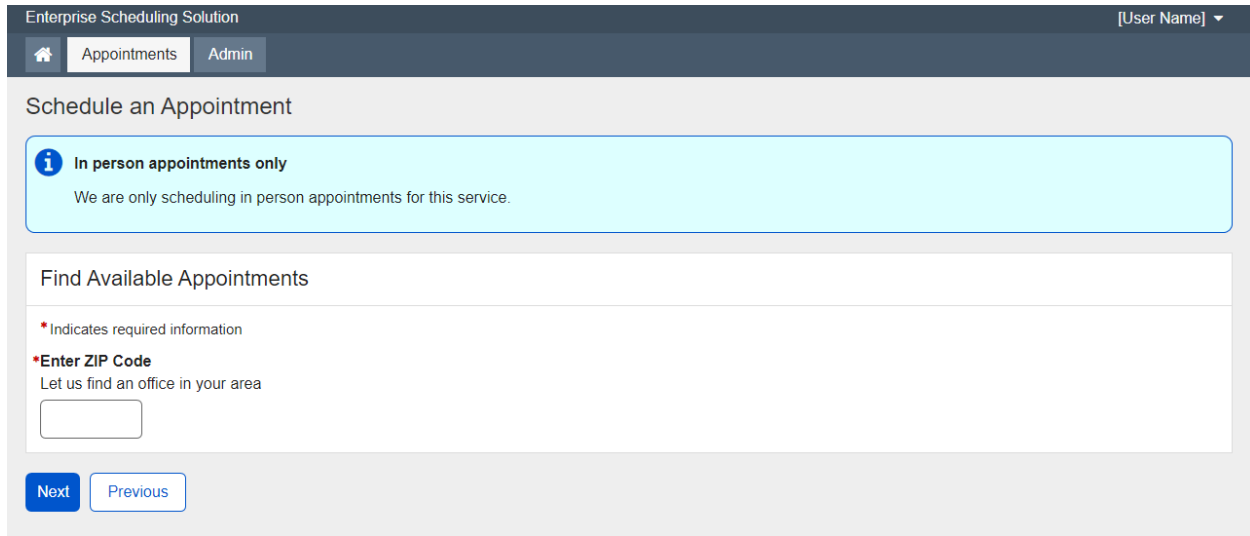
The reason for an appointment is either to obtain a new/original SSN or a replacement Social Security card. In both cases, the technician asks if the individual has started an online application in oSSNAP.

- If Yes, ESS asks if the individual has the Online Control Number associated with the application in oSSNAP.
  - If Yes, ESS asks for the Online Control Number.
- If No or Doesn't know, the technician may continue to the next step.

Note: Technicians will be able to select “Yes” that the customer has an Online Control number, not input the control number, and remind the customer to bring the number to their appointment if the customer does not have the number readily available.

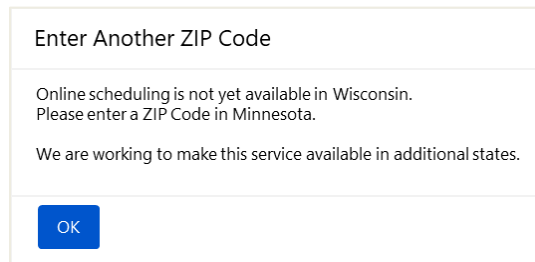
The technician clicks Next.

ESS next asks for a ZIP code, so it can find an available appointment at the caller’s local field office.



**Figure 44 ESS Technician Enter ZIP Code**

If the technician enters a ZIP code that ESS does not support, ESS displays a message:



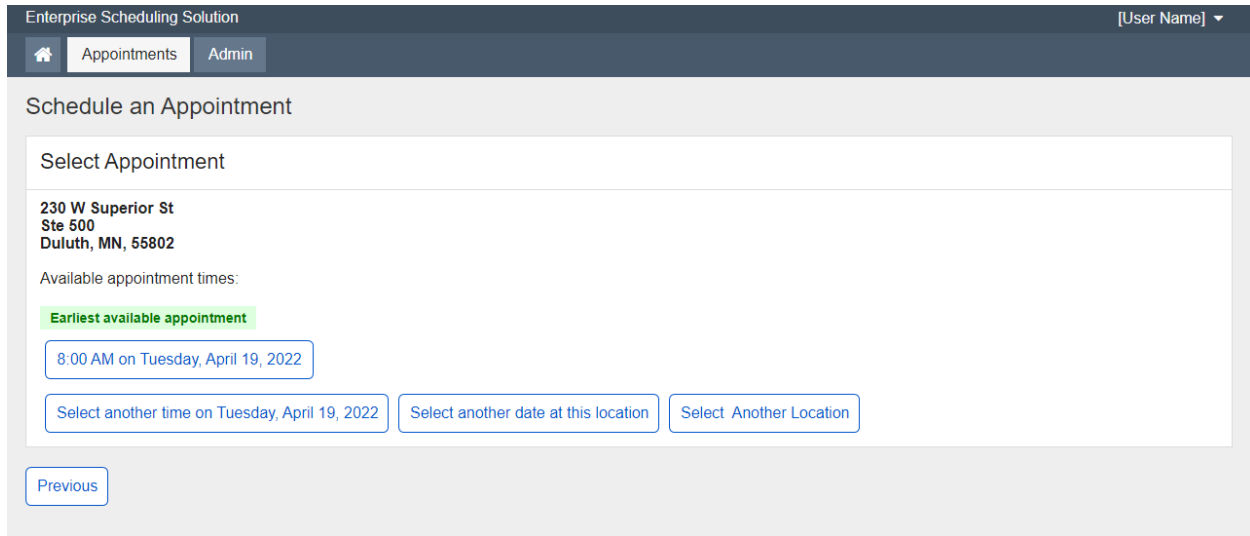
**Figure 45 ESS Technician Enter Another ZIP Code**

The technician reads the message to the caller and asks for a ZIP code that ESS supports. If the customer cannot complete their application in a supported field office, then the technician advises the customer of their other service options.

The technician clicks Next to continue.

ESS displays the first available appointment at the local servicing office associated with the ZIP code.

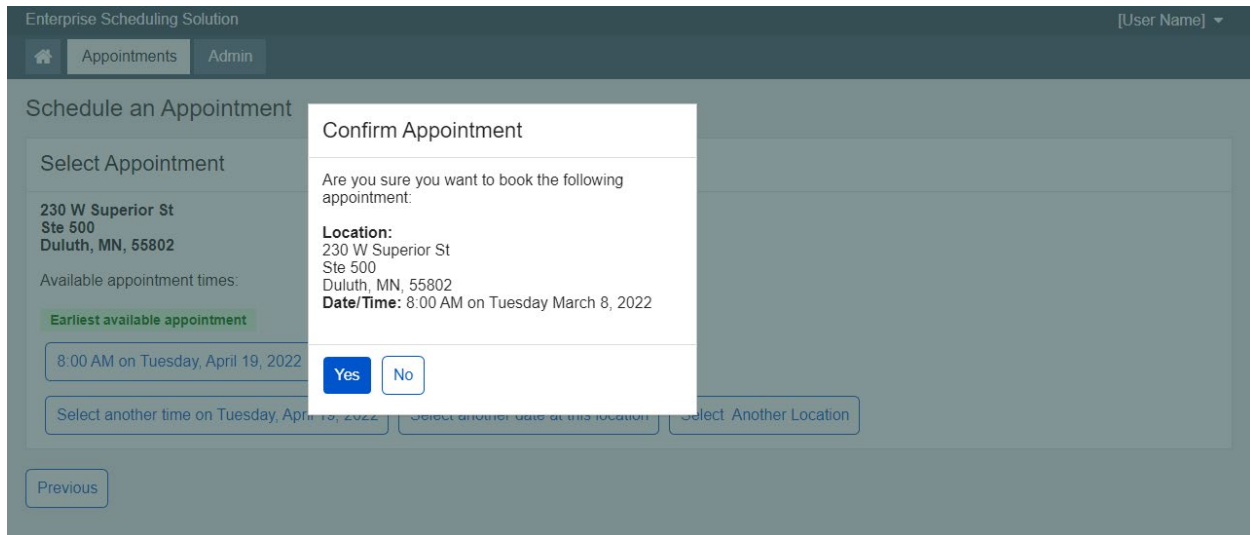
## Design Specifications Document – ESS Screen Package



**Figure 46 ESS Technician Earliest Available Appointment**

The technician provides the proposed date and time to the caller (earliest date and time available).

If the caller finds the time and date acceptable, the technician clicks the button with the time and date on it and confirms the appointment.



**Figure 47 ESS Technician Confirm Appointment**

The technician clicks Yes to continue.

For a review of the interfaces involved in finding an appointment location, date, and time, please refer to pages 9 to 21. The Public and Technician applications share similar design concepts.

The technician informs the caller that SSA can send a confirmation message, reminders, and check-in instructions for the appointment by text and email, which the caller can opt out of at any time.

Enterprise Scheduling Solution [User Name]

Home Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

\* Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

Next Previous

**Figure 48 ESS Technician Consent to Messaging Before Consent**

- If the caller does not consent to receiving electronic messages, when the technician clicks Next, a message appears to remind the individual that he or she will not receive messages about this appointment. The technician reads this message to the caller.

Confirm

**You will not receive messages about this appointment**

To Update or cancel your appointment, you must contact us at toll-free 1-800-772-1213 (TTY 1-800-325-0778).

OK

**Figure 49 ESS Technician No Consent to Messaging Message**

- If the caller agrees to receiving electronic messages, the technician checks the box indicating the caller's consent to the electronic messages. The technician asks how the caller would like to receive messages:
  - If the caller indicates Email, the technician asks for and enters the caller's email address.
  - If the caller indicates both Email and text messages, the technician asks for and enters the caller's email address and mobile phone number.



Enterprise Scheduling Solution [User Name]

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

\* Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

\* How would you like to receive these messages?

Email and text messages

Email

\* Your Email Address

\* Your U.S. Mobile Phone Number

10-digit Number

\* Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes

No

Next Previous

**Figure 50 ESS Technician Consent to Messaging After Consent, Email and text messages, No to OTP**

If the caller consents to receiving electronic messages, the technician also asks the caller to create an OTP to modify the appointment online. The caller may decline. If the caller agrees, the technician asks for a four-to-six numerical passcode, which the technician documents.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

\* Indicates required information

**Your Name**  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

\* How would you like to receive these messages?

Email and text messages  
 Email

\* Your Email Address

\* Your U. S. Mobile Phone Number  
10-digit Number

\* Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes  
 No

\* One Time Numerical Passcode (OTP)  
Enter 4 to 6 Characters

[Next](#) [Previous](#)

Figure 51 ESS Technician Consent to Messaging After Consent, Email and text messages, Yes to OTP

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

• Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

• How would you like to receive these messages?

Email and text messages

Email

• Your Email Address

Figure 52 ESS Technician Consent to Messaging After Consent, Email only, No to OTP

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

• Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

• How would you like to receive these messages?

Email and text messages

Email

• Your Email Address

• Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes

No

• One Time Numerical Passcode (OTP)  
Enter 4 to 6 Characters

Figure 53 ESS Technician Consent to Messaging After Consent, Email only, Yes to OTP

The technician clicks Next.

ESS asks for the individual's language preferences.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Language Preference

\*Indicates required information

**i** This is the language used during your appointment with a representative  
We can arrange for an interpreter at no cost to you

\*Spoken language preference  
English ▾

\*Written language preference  
English ▾

Next Previous

Figure 54 ESS Technician Language Preference

ESS asks for both spoken and written language preferences. Both default to English, but the technician can select another language for the individual, as needed.

The technician clicks Next to continue.

ESS asks for any remarks from the caller, individual, and/or technician. The technician may enter up to 2,500 characters. The oSSNAP Online Control Number will be added automatically to the Remarks if it was supplied in an earlier step. The remarks are locked after being entered by technicians and cannot be deleted or over keyed.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Remarks

Is there anything else we should know before your appointment?  
(2500 characters maximum)

oSSNAP Online Control Number: 022500043215

Characters remaining: 2500

Next Previous

Figure 55 ESS Technician Remarks

The technician clicks Next.

ESS displays a review page, listing all the information provided about the appointment.

Enterprise Scheduling Solution [User Name]

Appointments Admin

### Schedule an Appointment

**Review and Submit**  
These are all the answers you've provided. If you need to make any changes, please select "Edit" to return to that part of the application.

**Appointment Details**

**Personal Information** [Edit](#)

Your Name: John Quincy Smith  
For whom are you scheduling this appointment: Self  
Individual's SSN:  
Individual's Date of Birth: April 15, 1980

**Reason for Appointment** [Edit](#)

What can I help you with: Social Security Card  
Which of these best describes the reason for your appointment: Replacement Social Security Card  
Have you started your online application (oSSNAP): Yes  
Do you have your application Online Control Number (oSSNAP): No  
Online Control Number: N/A

**Appointment Details** [Edit](#)

Office Address  
Street Address: 230 W Superior St, Ste 500  
City/Town: Duluth  
State/Territory: Minnesota  
ZIP Code: 55802  
Appointment date: May 31, 2022  
Appointment time: 8:00 AM

**Consent to Messaging** [Edit](#)

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): Yes  
How would you like to receive these messages: Email and text messages  
Your Email address: johnsmith@email.com  
Your U.S. Mobile Phone Number: (218) 078-7591  
Would you like to provide a One Time Password (OTP) or PIN to modify this appointment online?: Yes  
One Time Password/PIN: 123456

**Language Preference** [Edit](#)

Spoken language preference: English  
Written language preference: English

**Remarks** [Edit](#)

Remarks: Remarks entered here by technician.

[Submit](#) [Previous](#)

Figure 56 ESS Technician Review and Submit

The technician will review this page with the caller and edit as needed.

The Reason for Appointment Edit button returns to the Reason for Appointment step. If the technician changes the reason for the appointment, a new appointment location, date, and time, must be selected. The technician will then step through the Consent to Messaging,

Language Preferences, and Remarks pages again, with the previously entered information still there.

The Appointment Details Edit button returns to the Select Appointment – Enter ZIP Code page. ESS prefills the ZIP code with the ZIP code of the previously selected office location. The technician will use the same interfaces to find a new appointment location, date, and time for the individual. The technician will then step through the Consent to Messaging, Language Preferences, and Remarks pages again, with the previously entered information still there.

The other Edit buttons return to their respective pages in the scheduling flow.

Once satisfied with the appointment details, the technician clicks Submit to schedule the appointment.

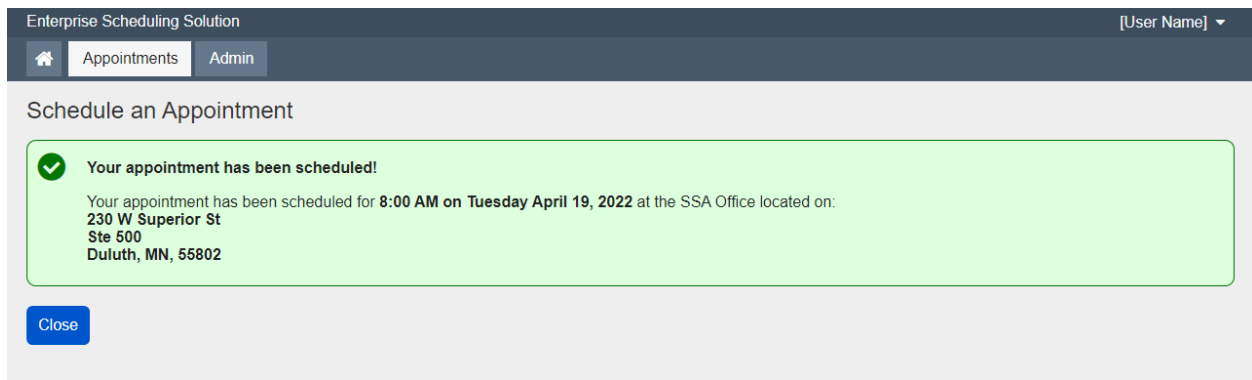


Figure 57 ESS Technician Appointment Scheduled Success

## 2.2. Reschedule, Modify, or Cancel an Appointment

Rescheduling, modifying, and cancelling appointments start with the technician verifying the caller is the proper applicant from oSSNAP.

The technician will open the Appointment function in ESS and begin to gather information from the caller.

The screenshot shows the 'Enterprise Scheduling Solution' web application. The top navigation bar includes a home icon, 'Appointments', and 'Admin' tabs, along with a user profile dropdown labeled '[User Name]'. The main content area is titled 'Schedule an Appointment' and contains a form with the following sections:

- Personal Information**
  - A note: *\*Indicates required information*
  - \*Your Name**
    - Text: 'This is the person requesting the appointment'
    - Fields: 'First', 'Middle', '\*Last', and 'Suffix' (a dropdown menu).
  - \*For whom are you scheduling this appointment?**
    - Radio buttons for 'Self' (selected) and 'Someone Else'.
  - Individual's Social Security Number (SSN)**
    - A text input field.
  - \*Individual's Date of Birth**
    - Fields for 'Month', 'Day', and 'Year' (all dropdown menus).
- Navigation buttons: 'Next' (blue) and 'Previous' (white with blue border).

Figure 58 ESS Technician Personal Information for Scheduling for Self

The technician first asks for the caller's name. First and last name are required.

The technician then asks for whom the caller is scheduling an appointment. The caller can reschedule, modify, or cancel an appointment if the caller made the original appointment. If the caller wants to reschedule, modify, or cancel an appointment, the technician asks for the caller's SSN and DOB. Since the caller may be making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required.



Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Personal Information

\* Indicates required information

**\* Your Name**  
This is the person requesting the appointment

\* First Middle \* Last Suffix

**\* For whom are you scheduling this appointment?**

Self

Someone Else

**Individual's Social Security Number (SSN)**

**Individual's Name**  
This is the person for whom you are scheduling the appointment

\* First Middle \* Last Suffix

**\* Individual's Date of Birth**

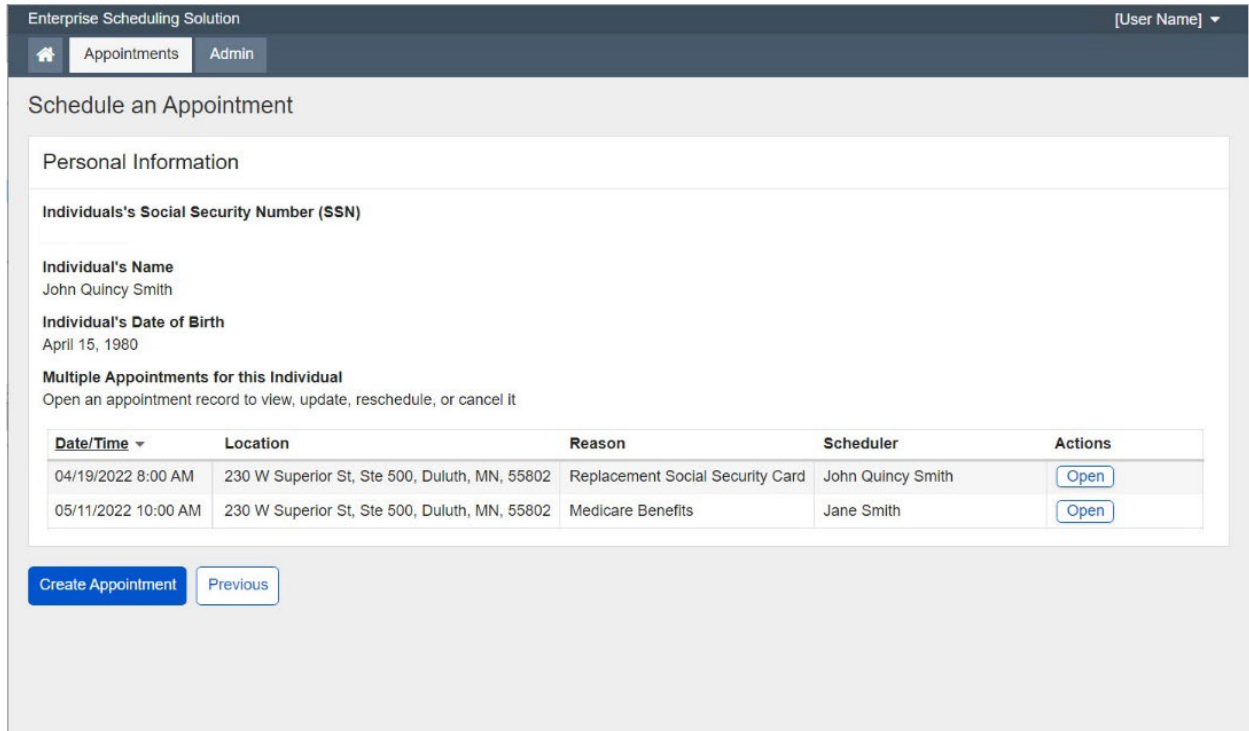
Month Day Year

Next Previous

**Figure 59 ESS Technician Personal Information for Someone Else**

If the caller wants to reschedule, modify, or cancel an appointment for someone else, the technician asks for that individual's SSN (not required), name (first and last required), and DOB. The technician clicks Next. If the technician does not enter the required fields an error message will appear, and the technician will be unable to proceed to the next screen.

ESS checks whether other appointments have been scheduled for the person for whom the appointment was made. If ESS finds multiple appointments, it displays a list of the appointments. The technician can then determine which of the appointments is relevant to the caller.



**Figure 60 ESS Technician Scheduled Appointments Found**

To reschedule, modify, or cancel, the technician must locate and open the appointment record. The appointment record looks similar to the Review and Submit page from the scheduling process, except instead of Edit buttons, there are Update buttons and a Reschedule button.

Enterprise Scheduling Solution [User Name]

Appointments Admin

### Appointment Details

**Review Appointment Details**  
The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

**Appointment Details**

**Personal Information**

Your Name: **John Quincy Smith**  
For whom are you scheduling this appointment: **Self**  
Individual's SSN: \_\_\_\_\_  
Individual's Date of Birth: **April 15, 1980**

**Reason for Appointment** Update

What can I help you with: **Social Security Card**  
Which of these best describes the reason for your appointment: **Replacement Social Security Card**  
Have you started your online application (oSSNAP): **Yes**  
Do you have your application Online Control Number (oSSNAP): **No**  
Online Control Number: **N/A**

**Appointment Details** Reschedule Appointment  
Cancel Appointment

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55802**  
Appointment date: **May 31, 2022**  
Appointment time: **8:00 AM**

**Consent to Messaging** Update

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218) 078-7591**

**Language Preference** Update

Spoken language preference: **English**  
Written language preference: **English**

**Remarks** Update

Remarks: **Remarks entered here by technician.**

Log Out

Figure 61 ESS Technician Review Existing Appointment Details

To update any of the information, the technician clicks the Update button to revisit that section of the scheduling process.

To reschedule the appointment, the technician clicks Reschedule Appointment, which revisits the Select Appointment – Enter ZIP Code page. As when editing the original appointment, ESS prefills the ZIP code with the ZIP code of the previously selected office location. The technician will use the same interfaces to find a new appointment location, date, and time for the individual.

# Design Specifications Document – ESS Screen Package

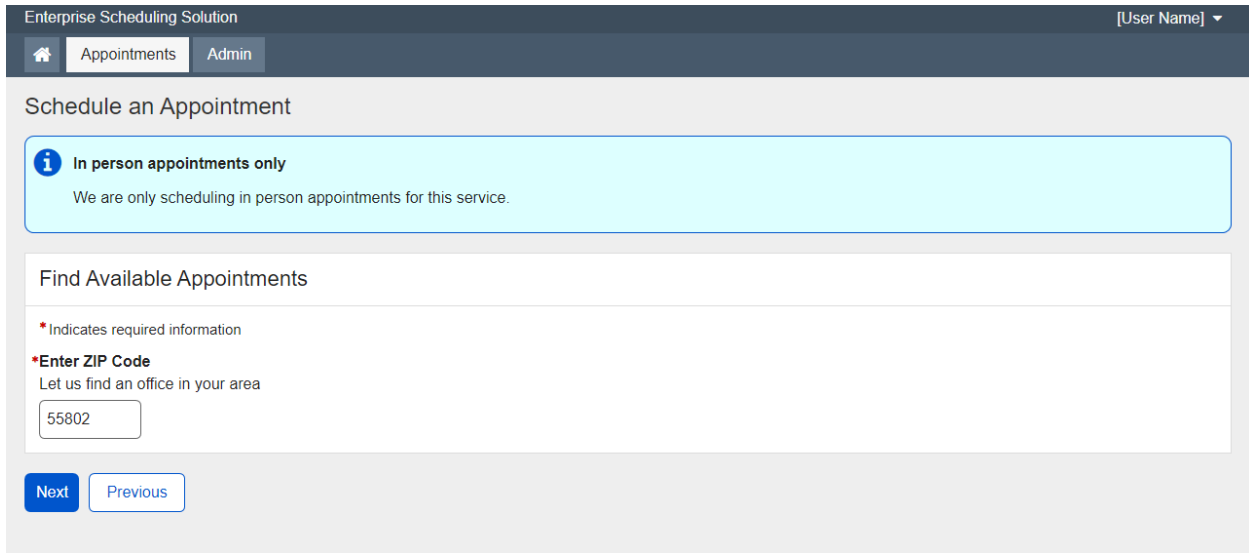


Figure 62 ESS Technician Enter ZIP Code

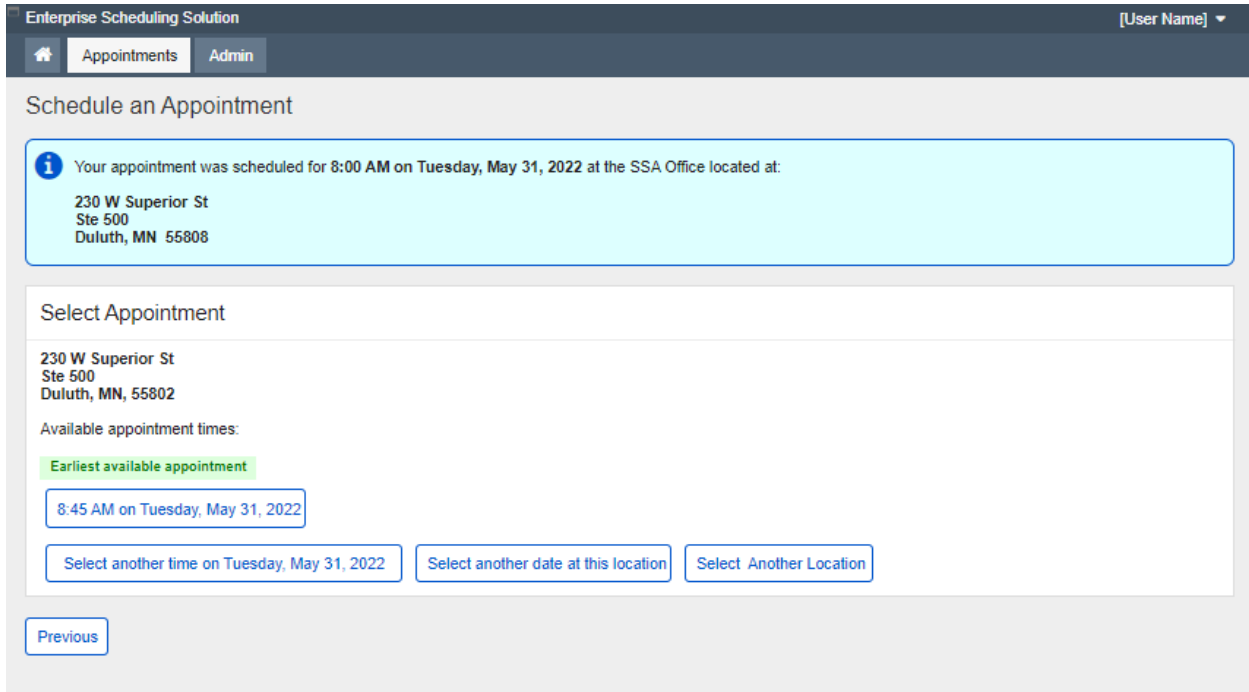
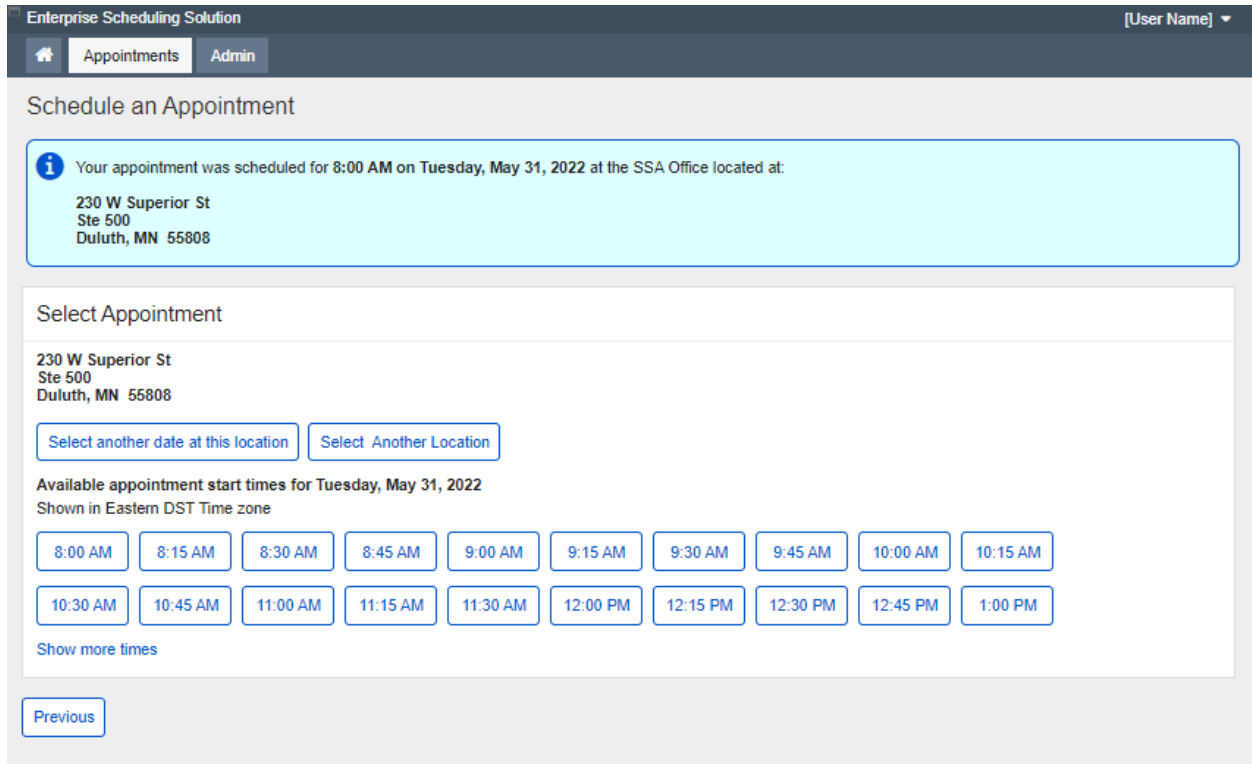


Figure 63 ESS Technician Earliest Available Appointment

# Design Specifications Document – ESS Screen Package



**Figure 64 ESS Technician Select Another Appointment on Same Date at Same Location**

# Design Specifications Document – ESS Screen Package

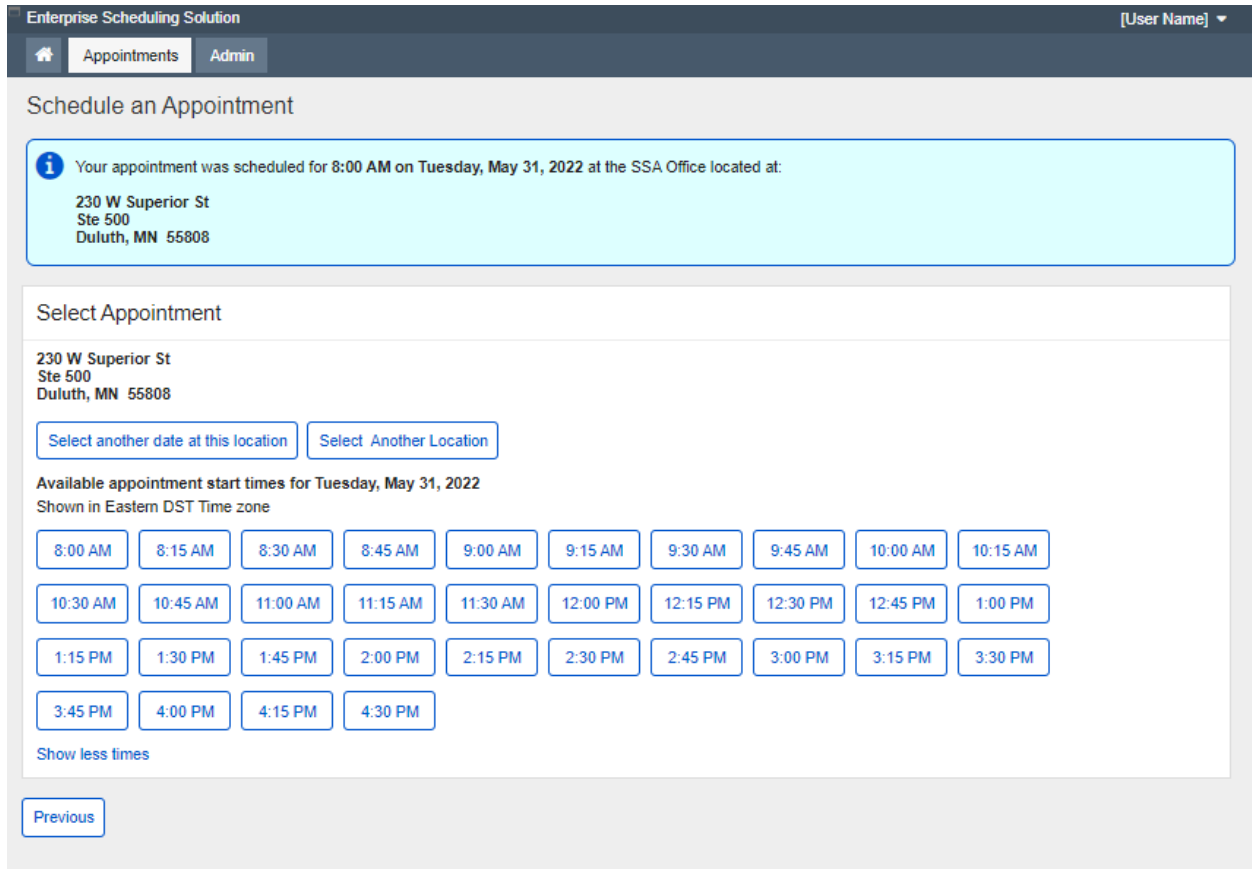


Figure 65 ESS Technician Show More Times

# Design Specifications Document – ESS Screen Package

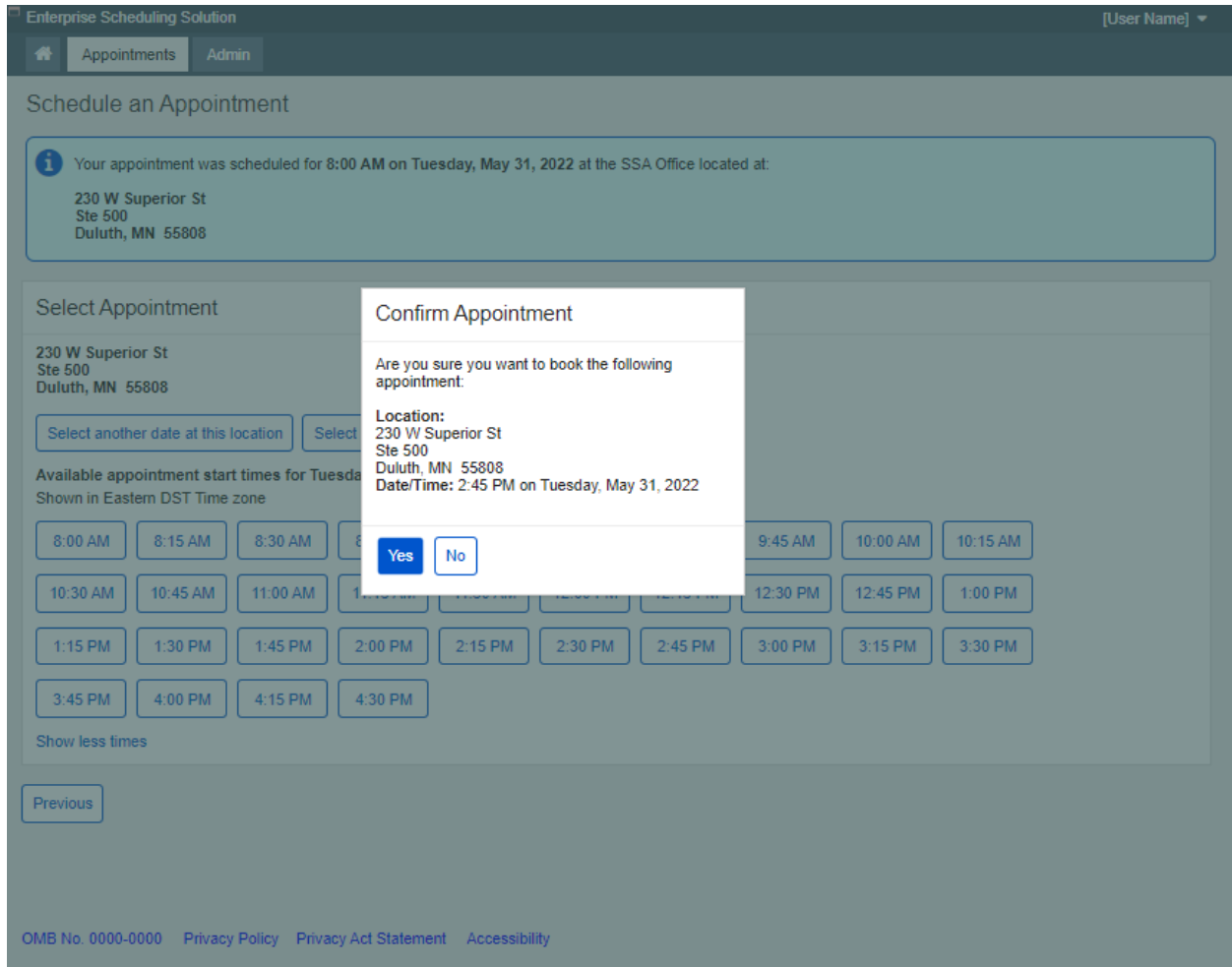


Figure 66 ESS Technician Confirm Appointment

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name]

Appointments Admin

## Appointment Details

### Review Appointment Details

The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

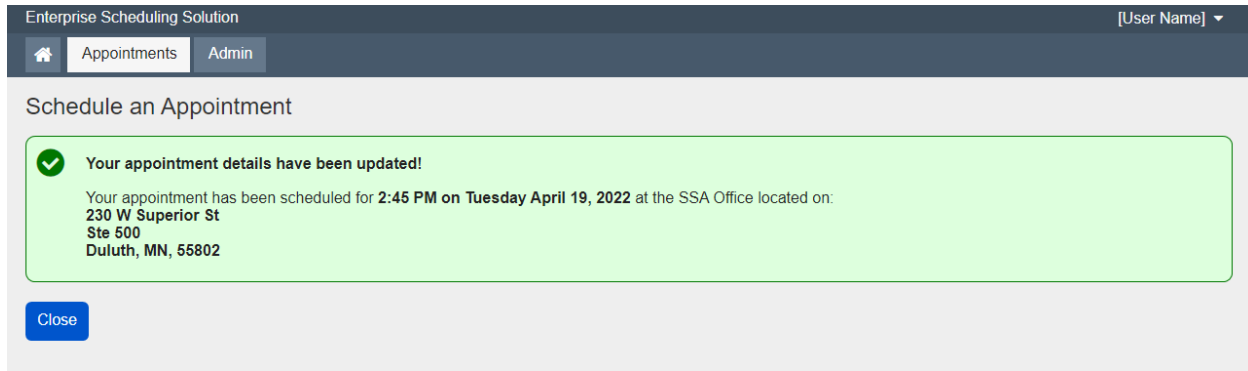
- Personal Information**  
Your Name: John Quincy Smith  
For whom are you scheduling this appointment: Self  
Individual's SSN:  
Individual's Date of Birth: April 15, 1980
- Reason for Appointment** [Edit](#)  
What can I help you with: Social Security Card  
Which of these best describes the reason for your appointment: Replacement Social Security Card  
Have you started your online application (oSSNAP): Yes  
Do you have your application Online Control Number (oSSNAP): No  
Online Control Number: N/A
- Appointment Details** [Edit](#)
- Appointment information updated. Please select "Submit" button to finalize changes.**
- Office Address**  
Street Address: 230 W Superior St, Ste 500  
City/Town: Duluth  
State/Territory: Minnesota  
ZIP Code: 55802  
Appointment date: May 31, 2022  
Appointment time: 2:45 PM
- Consent to Messaging** [Edit](#)  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): Yes  
How would you like to receive these messages: Email and text messages  
Your Email address: johnsmith@email.com  
Your U.S. Mobile Phone Number: (218) 078-7591
- Language Preference** [Edit](#)  
Spoken language preference: English  
Written language preference: English
- Remarks** [Edit](#)  
Remarks: Remarks entered here by technician.

[Submit](#)

Figure 67 ESS Technician Review Appointment Details Showing Updates




## Design Specifications Document – ESS Screen Package



Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

### Schedule an Appointment

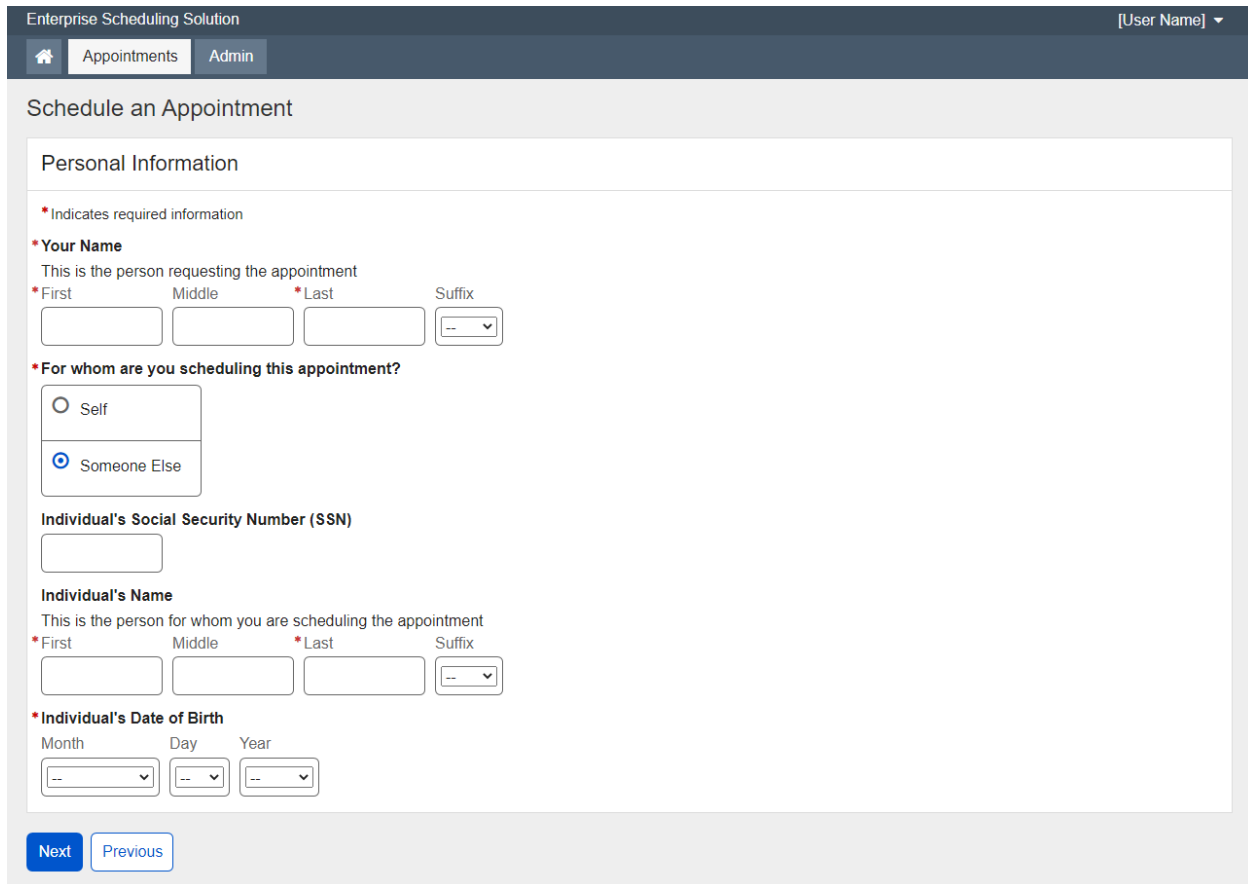
 **Your appointment details have been updated!**

Your appointment has been scheduled for **2:45 PM on Tuesday April 19, 2022** at the SSA Office located on:  
**230 W Superior St  
Ste 500  
Duluth, MN, 55802**

[Close](#)

**Figure 68 ESS Technician Appointment Updated Success**

To cancel the appointment, the technician clicks the Cancel Appointment button at the bottom of the page. ESS asks for confirmation and presents a successful cancellation message at the end.



Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

### Schedule an Appointment

#### Personal Information

\* Indicates required information

**\* Your Name**  
This is the person requesting the appointment

\* First Middle \* Last Suffix

**\* For whom are you scheduling this appointment?**

Self  
 Someone Else

**Individual's Social Security Number (SSN)**

**Individual's Name**  
This is the person for whom you are scheduling the appointment

\* First Middle \* Last Suffix

**\* Individual's Date of Birth**

Month Day Year

[Next](#) [Previous](#)

**Figure 69 ESS Technician Personal Information for Someone Else**

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

### Schedule an Appointment

**Personal Information**

**Individuals's Social Security Number (SSN)**

**Individual's Name**  
John Quincy Smith

**Individual's Date of Birth**  
April 15, 1980

**Multiple Appointments for this Individual**  
Open an appointment record to view, update, reschedule, or cancel it

Date/Time ▾	Location	Reason	Scheduler	Actions
04/19/2022 8:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Replacement Social Security Card	John Quincy Smith	<a href="#">Open</a>
05/11/2022 10:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Medicare Benefits	Jane Smith	<a href="#">Open</a>

[Create Appointment](#) [Previous](#)

**Figure 70 ESS Technician Scheduled Appointments Found**

Enterprise Scheduling Solution
[User Name] ▾

🏠
Appointments
Admin

### Appointment Details

**Review Existing Appointment Details**  
 The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

**Appointment Details**

✔ **Personal Information**

Your Name: **John Quincy Smith**  
 For whom are you scheduling this appointment: **Self**  
 Individual's SSN:  
 Individual's Date of Birth: **April 15, 1980**

[Update](#)

✔ **Reason for Appointment**

What can I help you with: **Social Security Card**  
 Which of these best describes the reason for your appointment: **Replacement Social Security Card**  
 Have you started your online application (oSSNAP): **Yes**  
 Do you have your application Online Control Number (oSSNAP): **N/A**  
 Online Control Number: **N/A**

[Update](#)

✔ **Appointment Details**

Office Address  
 Street Address: **230 W Superior St, Ste 500**  
 City/Town: **Duluth**  
 State/Territory: **Minnesota**  
 ZIP Code: **55802**  
 Appointment date: **May 31, 2022**  
 Appointment time: **2:45 PM**

[Reschedule Appointment](#)  
[Cancel Appointment](#)

✔ **Consent to Messaging**

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
 How would you like to receive these messages: **Email and text messages**  
 Your Email address: **johnsmith@email.com**  
 Your U.S. Mobile Phone Number: **(218) 078-7591**

[Update](#)

✔ **Language Preference**

Spoken language preference: **English**  
 Written language preference: **English**

[Update](#)

✔ **Remarks**

Remarks: **Remarks entered here by technician.**

[Update](#)

[Submit](#)

Figure 71 ESS Technician Review Appointment Details

# Design Specifications Document – ESS Screen Package

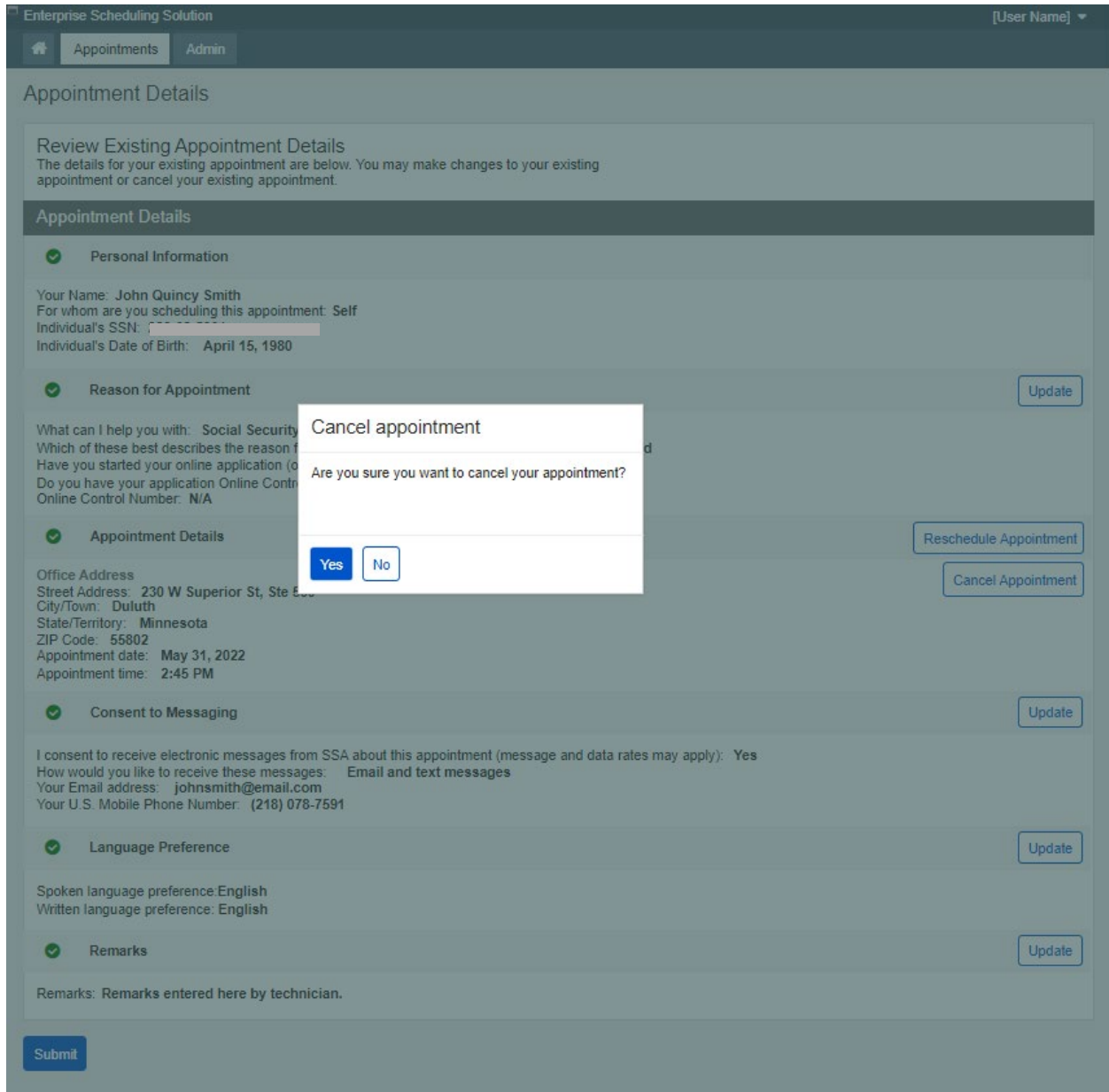


Figure 72 ESS Technician Cancel Appointment Confirmation

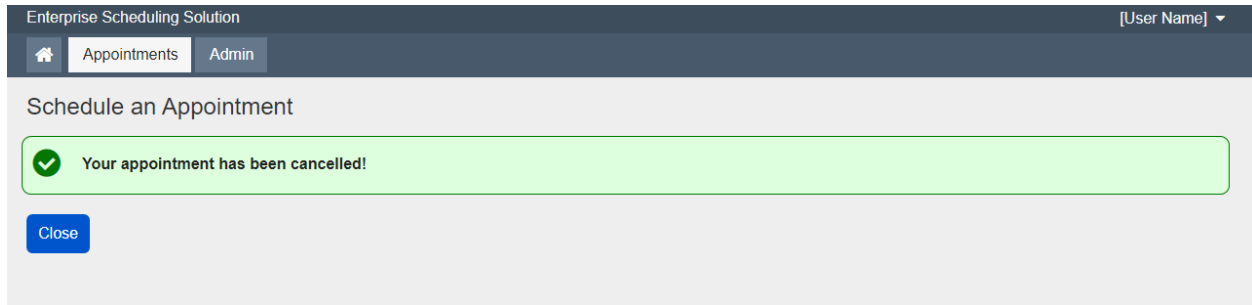


Figure 73 ESS Technician Cancel Appointment Success

### 2.3. Schedule Appointment for Someone Else

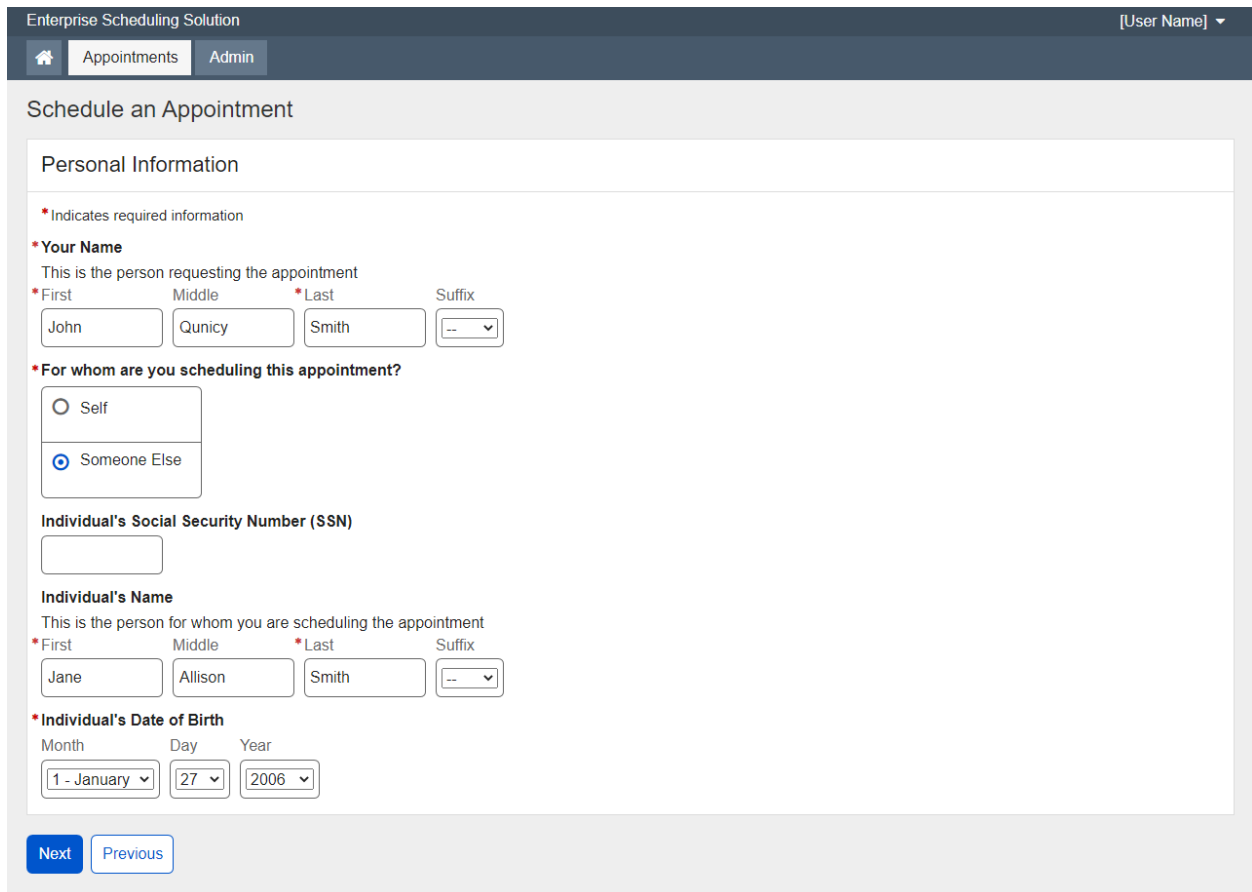


Figure 74 ESS Technician Personal Information for Someone Else

# Design Specifications Document – ESS Screen Package

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a header with the text 'Enterprise Scheduling Solution' on the left and '[User Name]' on the right. Below the header is a navigation bar with a home icon, 'Appointments', and 'Admin' tabs. The main heading is 'Schedule an Appointment'. The form is titled 'Personal Information' and contains the following fields: 'Individuals's Social Security Number (SSN)', 'Individual's Name' (Jane Allison Smith), and 'Individual's Date of Birth' (January 27, 2006). A yellow message box with an exclamation mark icon contains the text 'No appointments found for this individual.'. At the bottom, there are two buttons: 'Create Appointment' and 'Previous'.

Figure 75 ESS Technician No Scheduled Appointment Found

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a header with the text 'Enterprise Scheduling Solution' on the left and '[User Name]' on the right. Below the header is a navigation bar with a home icon, 'Appointments', and 'Admin' tabs. The main heading is 'Schedule an Appointment'. The form is titled 'Reason for Appointment'. It includes a legend: '\* Indicates required information'. The form contains several sections: '\* What can I help you with?' with a dropdown menu showing 'Social Security Card'; '\* Which of these best describes the reason for your appointment?' with two radio button options: 'Original Social Security Card' (You have never had a Social Security number) and 'Replacement Social Security Card' (You need a replacement Social Security card), where the second option is selected; '\* Have you started your online application (oSSNAP)?' with three radio button options: 'Yes' (selected), 'No', and 'Doesn't know'; '\* Do you have your application Online Control Number (oSSNAP)?' with three radio button options: 'Yes', 'No', and 'Doesn't know' (selected). Below these sections is a text input field for 'Online Control Number'. At the bottom, there are two buttons: 'Next' and 'Previous'.

Figure 76 ESS Technician Reason for Appointment

# Design Specifications Document – ESS Screen Package

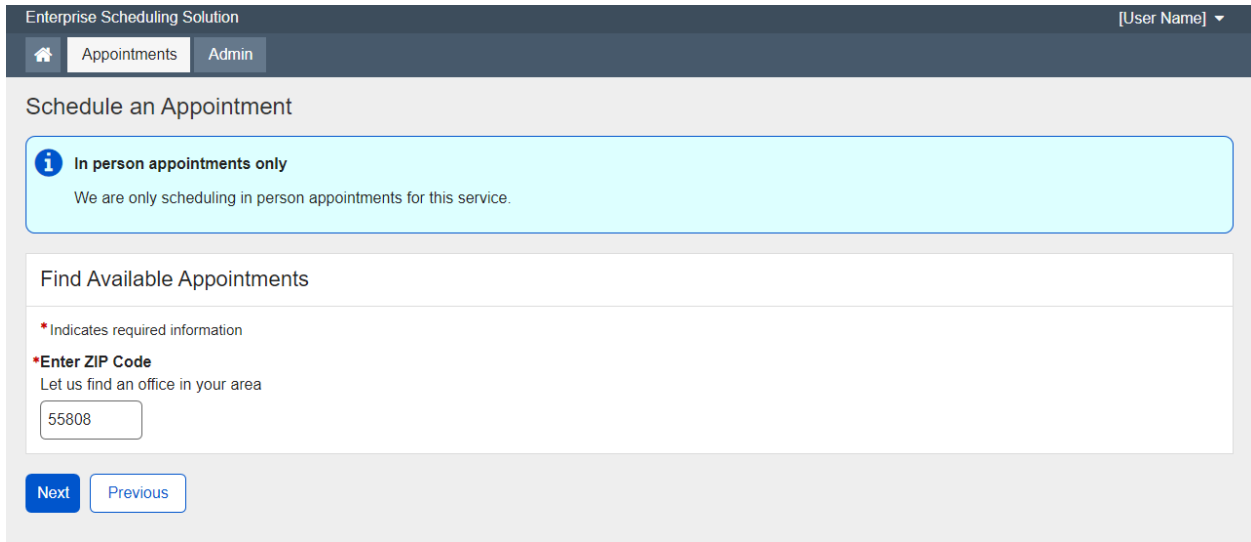


Figure 77 ESS Technician Enter ZIP Code

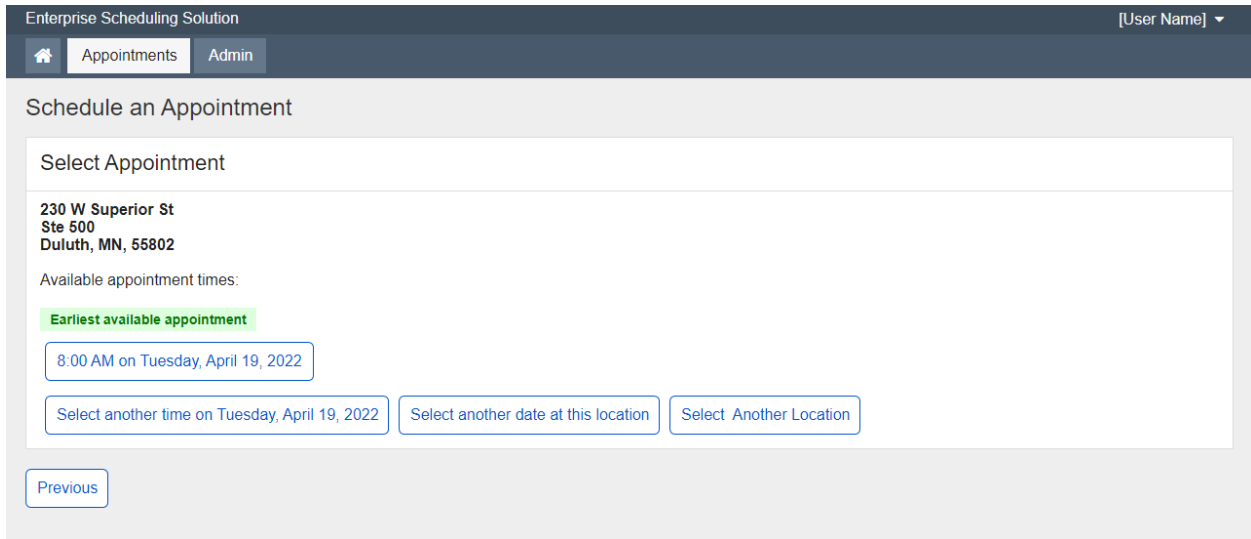


Figure 78 ESS Technician Earliest Available Appointment

# Design Specifications Document – ESS Screen Package

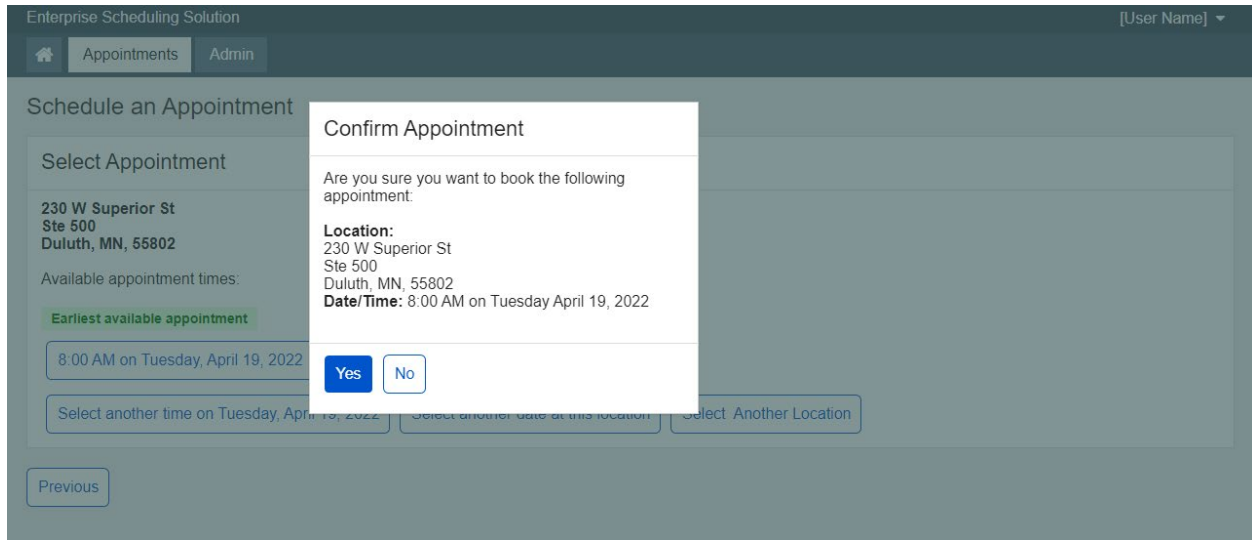


Figure 79 ESS Technician Confirm Appointment

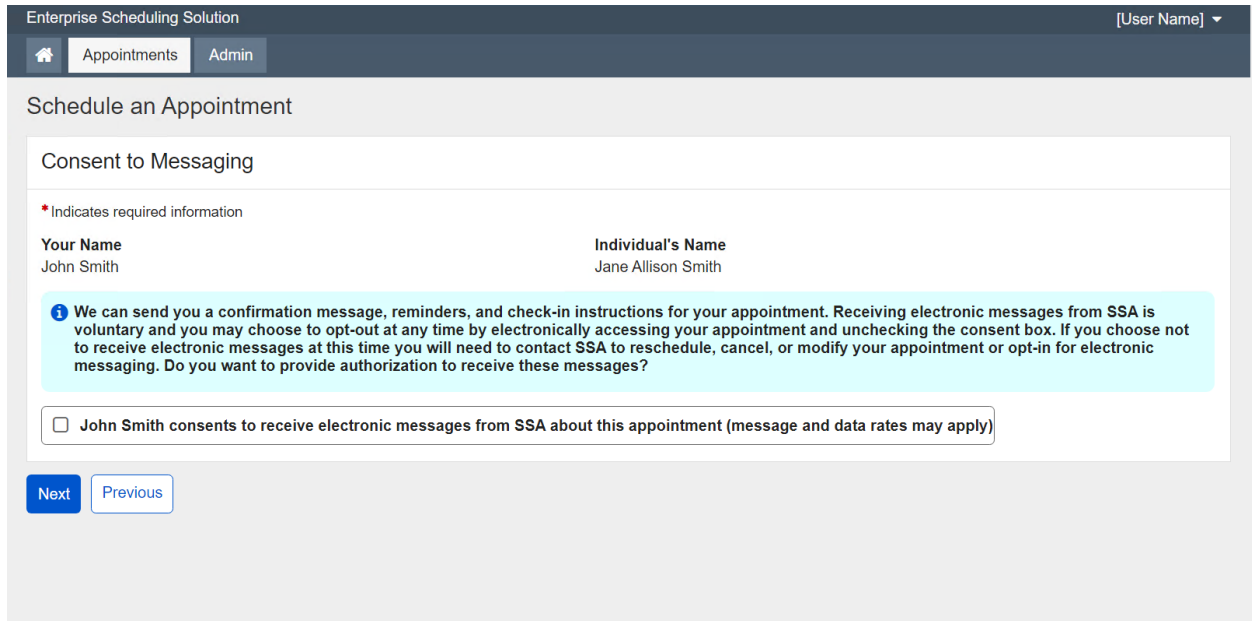


Figure 80 ESS Technician Consent to Messaging (Someone Else) Before Consent

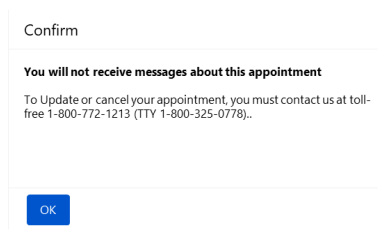


Figure 81 ESS Technician No Consent to Messaging Message



Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

\* Indicates required information

<b>Your Name</b> John Smith	<b>Individual's Name</b> Jane Allison Smith
--------------------------------	--

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

\* How would you like to receive these messages?

Email and text messages

Email

\* Your Email Address

\* Your U.S. Mobile Phone Number  
10-digit Number

\* Would you like to provide a One Time Password (OTP) or PIN to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes

No

\* One Time Password/PIN  
Enter 4 to 6 Characters

**Next** Previous

Figure 82 ESS Technician Consent to Messaging (Someone Else) After Consent

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Language Preference

\*Indicates required information

**i** This is the language used during your appointment with a representative  
We can arrange for an interpreter at no cost to you

\*Spoken language preference  
English ▾

\*Written language preference  
English ▾

Next Previous

Figure 83 ESS Technician Language Preference

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Remarks

Is there anything else we should know before your appointment?  
(2500 characters maximum)

Characters remaining: 2500

Next Previous

Figure 84 ESS Technician Remarks

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

## Schedule an Appointment

### Review and Submit

These are all the answers you've provided. If you need to make any changes, please select "Edit" to return to that part of the application.

#### Appointment Details

✔ **Personal Information** [Edit](#)

Your Name: **John Quincy Smith**  
For whom are you scheduling this appointment: **Someone Else**  
Individual's Name: **Jane Allison Smith**  
Individual's SSN:  
Individual's Date of Birth: **January 27, 2006**

✔ **Reason for Appointment** [Edit](#)

What can I help you with: **Social Security Card**  
Which of these best describes the reason for your appointment: **Replacement Social Security Card**  
Have you started your online application (oSSNAP): **Yes**  
Do you have your application Online Control Number (oSSNAP): **No**  
Online Control Number: **N/A**

✔ **Appointment Details** [Edit](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55802**  
Appointment date: **May 31, 2022**  
Appointment time: **8:45 AM**

✔ **Consent to Messaging** [Edit](#)

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218) 078-7591**  
Would you like to provide a One Time Password (OTP) or PIN to modify this appointment online?: **Yes**  
One Time Password/PIN: **123456**

✔ **Language Preference** [Edit](#)

Spoken language preference: **English**  
Written language preference: **English**

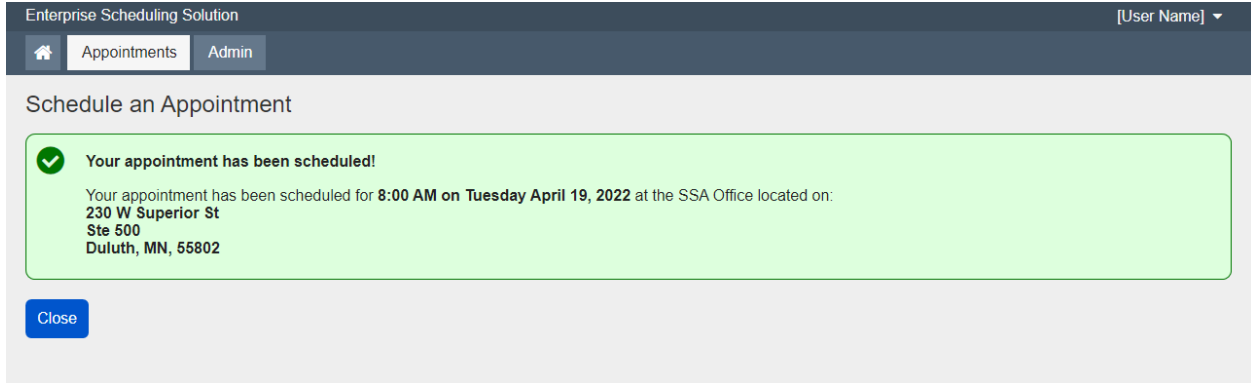
✔ **Remarks** [Edit](#)

Remarks: **Remarks entered here by technician.**

[Submit](#) [Previous](#)

Figure 85 ESS Technician Review and Submit

# Design Specifications Document – ESS Screen Package



**Figure 86 ESS Technician Appointment Scheduled Success**

***SSA will insert the following PRA Statement into the form as soon as possible:***

**Paperwork Reduction Act Statement** - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. We estimate that it will take about 3 minutes to read the instructions, gather the facts, and answer the questions. ***Send only comments regarding this burden estimate or any other aspect of this collection, including suggestions for reducing this burden to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.***

**Original** screen did not display contact type for the appointment.

### Appointment Details

**Review Appointment Details**  
The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

**Reason for Appointment**

What can we help you with: **Replacement Social Security Card**

**Appointment Options** [Reschedule Appointment](#)  
[Cancel Appointment](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **May 31, 2022**  
Appointment time: **8:00 AM**

**Personal Information** [Update](#)

Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218) 078-7591**

**Language Preference** [Update](#)

Spoken language preference: **English**  
Written language preference: **English**

[Log Out](#)

**New** display will list the contact type of the appointment; either 'In Office' or 'Video' read only.

### Appointment Details

**Review Appointment Details**  
The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

**Reason for Appointment**

What can we help you with: **Replacement Social Security Card** **Contact Type: Video**

**Appointment Options** [Reschedule Appointment](#)  
[Cancel Appointment](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **May 31, 2022**  
Appointment time: **8:00 AM**

**Personal Information** [Update](#)

Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218) 078-7591**

**Language Preference** [Update](#)

Spoken language preference: **English**  
Written language preference: **English**

[Log Out](#)

The original email listed 'In Office' for all appointments (outlined in red)

ESS email-

From: <[no-reply@ssa.gov](mailto:no-reply@ssa.gov)>  
Date: Thu, Jul 20, 2023, 2:19 PM  
Subject: Appointment Confirmation  
To: <[nahreen.ferdous.snl@gmail.com](mailto:nahreen.ferdous.snl@gmail.com)>

Thank you for contacting the Social Security Administration. You scheduled an in-office appointment with us. This is confirmation of the date and time of your appointment.

Date of Appointment: Friday, July 21, 2023  
Time of Appointment: 09:00 AM

If you need to cancel or reschedule your appointment or would like to opt out of electronic messages, please click the following link: <https://secureval.ssa.gov/ess/customer-ui/reschedule/RzIRHglr4E>

The new email will list either 'In Office' as it currently exists, or 'Video' for appointments scheduled by a technician that the customer requests as 'Video' as the contact type (outlined in red).

ESS email-

From: <[no-reply@ssa.gov](mailto:no-reply@ssa.gov)>  
Date: Thu, Jul 20, 2023, 2:19 PM  
Subject: Appointment Confirmation  
To: <[nahreen.ferdous.snl@gmail.com](mailto:nahreen.ferdous.snl@gmail.com)>

Thank you for contacting the Social Security Administration. You scheduled a Video appointment with us. This is confirmation of the date and time of your appointment.

Date of Appointment: Friday, July 21, 2023  
Time of Appointment: 09:00 AM

If you need to cancel or reschedule your appointment or would like to opt out of electronic messages, please click the following link: <https://secureval.ssa.gov/ess/customer-ui/reschedule/RzIRHglr4E>

**Original** Screen with passive non consent to electronic messaging, original informational banner for electronic messaging, and text message information presented to all users.

Customer Scheduling

### Schedule an Appointment

#### Consent To Messaging

\* Indicates required information

**Your Name**  
John Customer

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by unchecking the consent box. Please provide authorization to receive these messages by checking the consent box. Otherwise, you may proceed with confirming your appointment by clicking "Next."

**i** More information About Text Messages

- For help, text "HELP"
- To stop, text "STOP" or change your notification preferences by navigating back to the Personal Information page through the re-schedule link you receive
- Text message notifications may not work with all carriers
- Message and data rates may apply
- Message frequency varies

You can view our terms and conditions and privacy policy at <https://public.govdelivery.com/accounts/USSSA/text-message>

John Customer consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

**Your U.S. Mobile Phone Number**  
10-digit Number

**Next** Previous

**New** screen with 'Yes' and 'No' options to consent to messaging and updated informational electronic messaging banner.

## Schedule an Appointment

### Personal Information

\* Indicates required information

**Your Name**  
John Quincy Smith

**Your Phone Number**  
You may receive a phone call regarding any matters related to your appointment

( 218 ) 445 - 5698

**i** We can send you messages to confirm, remind, and provide instructions for your appointment.

It's your choice whether you want to receive these electronic messages. If you don't want them, simply select "No, I do not consent" to opt out. If you do want to receive the messages, select "Yes, I consent" to authorize us to send them to you.

You can change your mind by revisiting this page.

\* Do you consent to receive electronic messages from SSA?

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**Next** Previous



**Original** screen with U.S. Mobile Phone Number collection

**\* How would you like to receive these messages?**

Email and text messages

Email

**\* Your Email Address**

**\* Your U.S. Mobile Phone Number**

10-digit Number

**New** screen display when user selects 'Yes' to receive text messages and to display 'More Information About Text Messages' after a customer consents to receive text messages.

**\* Do you consent to receive electronic messages from SSA?**

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**\* Your Email Address**

You will receive messages about this appointment at this address

**\* Would you also like to receive text messages?**

Yes  No

**\* Your U.S. Mobile Phone Number**

You will receive text messages about this appointment at this number

**i More Information About Text Messages**

- For help, text "HELP"
- To stop, text "STOP" or change your notification preferences by navigating back to the Personal Information page through the re-schedule link you receive
- Text message notifications may not work with all carriers
- Message and data rates may apply
- Message frequency varies

You can view our terms and conditions and privacy policy at <https://public.govdelivery.com/accounts/USSSA/text-message>

**Next** Previous

**Original** screen display in update path when the checkmark box is unselected and pop-up message displays.

## Schedule an Appointment

### Consent To Messaging

\* Indicates required information

Your Name  
John Public

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by unchecking the consent box. Please provide authorization to receive these messages by checking the consent box. Otherwise, you may proceed with confirming your appointment by clicking "Next."

#### **i** More information About Text Messages

- For help, text "HELP"
- To stop, text "STOP" or change your notification preferences by navigating back to the Personal Information page through the re-schedule link you receive
- Text message notifications may not work with all carriers
- Message and data rates may apply
- Message frequency varies

You can view our terms and conditions and privacy policy at <https://public.govdelivery.com/accounts/USSSA/text-message>

John Public consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

## Confirm

### You will not receive messages about this appointment

To update or cancel your appointment, you must contact us toll-free at 1-800-772-1213 (TTY 1-800-325-0778).

When you arrive for your appointment, you must check in at the Kiosk.

Ok

Cancel

**New** screen display for update path when a customer changes their response from 'Yes' to 'No' for consent to messaging.

\* Do you consent to receive electronic messages from SSA?

- Yes, I consent  
SSA may send electronic messages
- No, I do not consent  
SSA will not send electronic messages

**i** You will not receive messages about this appointment. To update or cancel your appointment, you must contact us toll-free at 1-800-772-1213 (TTY 1-800-325-0778). When you arrive for your appointment, you must check in at the kiosk.

Additionally, please be aware that you will not receive **ANY** text messages from SSA at this U.S. Mobile Phone Number moving forward. This includes text messages related to other appointments or transactions you may currently have with SSA.

Done